

Volunteer Interest Group Role Description

Chair

Role Description

Volunteer responsible for overall oversight of the interest group and other officers. The chair directs activities of the other leaders in accordance with the interest group operational plan to meet strategic goals.

Roles and Responsibilities

In order of importance

- Strive to achieve the interest group's vision, mission and objectives as detailed by the interest group leadership and the CPCU Society strategic plan.
- Direct activities of other officers toward interest group goals and objectives.
- Assume responsibility for the overall functioning of the interest group.
- Establish and maintain financial operations processes to ensure continuity of interest group operations, and define, document and maintain interest group policies.
- Develop, maintain and manage the interest group's budget.
- Ensure that the interest group leadership works together as a team.
- Represent the interest group at public events.
- Attend, organize, support and preside over interest group meetings (monthly).
- Direct projects in support of the interest group's strategic goals.
- Review any interest group contract, agreement and insurance.
- Recommend improvements in operational processes.
- Serve as liaison with the CPCU Society.
- With the Leadership Council president, develop and implement a succession and transition plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- Analyze cost impact and income benefit of all activities proposed by the interest group leadership.
- Provide monthly financial reporting regarding the state of finances of interest group activity to executive-level volunteer leaders.

Role-Specific Skills

In order of importance

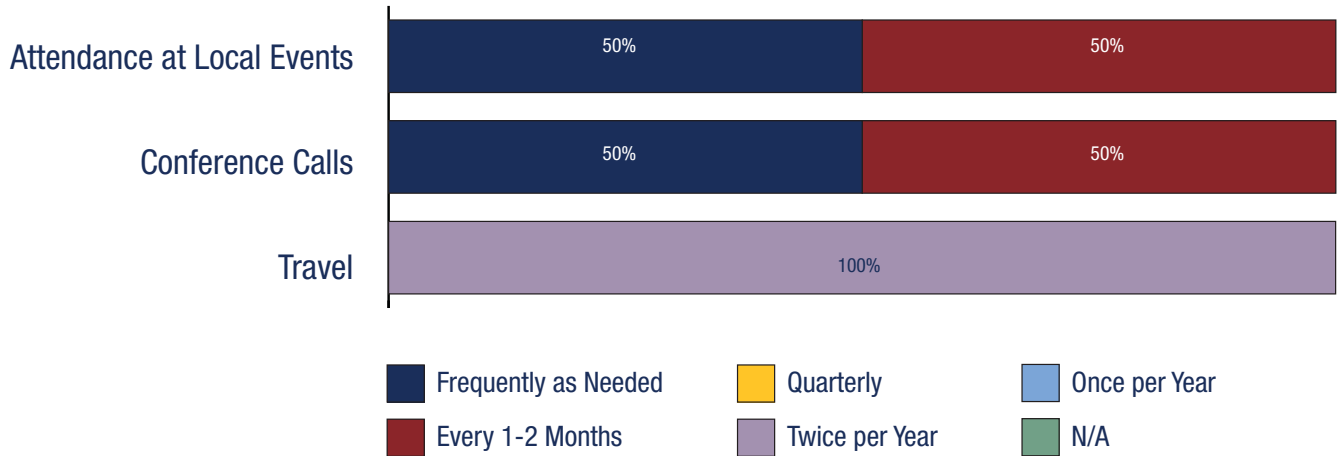
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Organization management
- Legal awareness
- Project management
- Financial and budget planning
- Accounting software/tools (for example, QuickBooks, Excel)
- Knowledge of generally accepted accounting principles (GAAP)

Leadership Skills

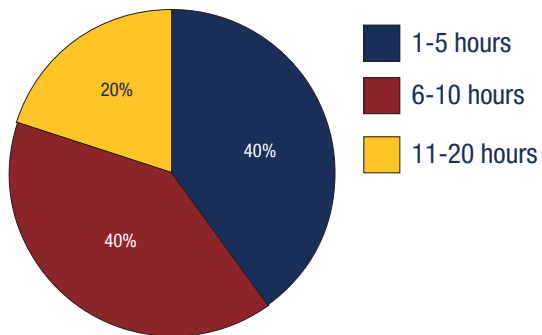
In order of importance

- Ability to delegate effectively
- Adaptability/flexibility
- Strategic thinking
- Facilitation
- Networking/relationship building
- Team building
- Public speaking/presentation
- Conflict resolution
- Time management

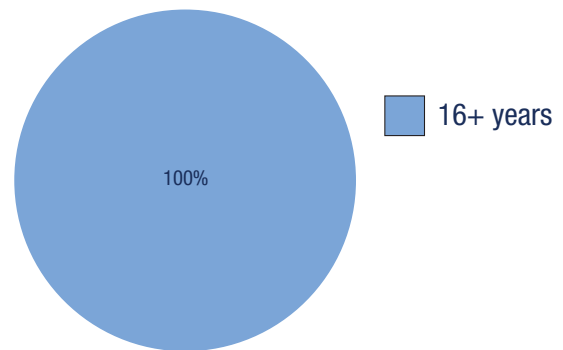
Frequency of Commitments



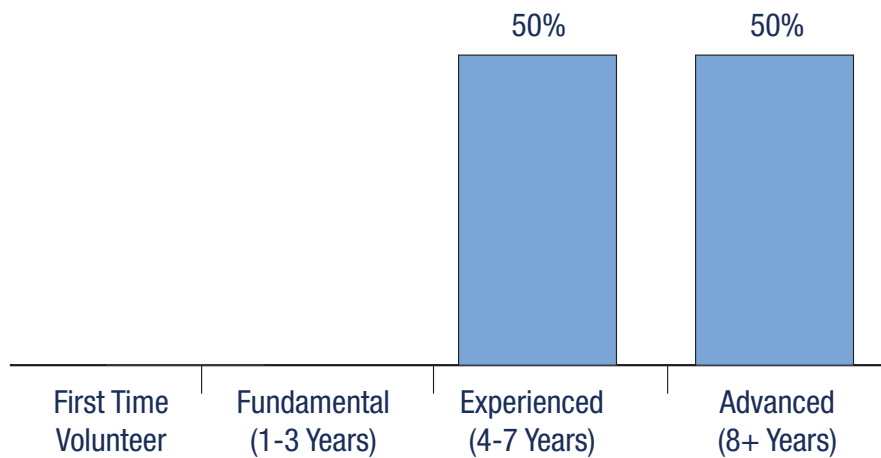
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Vice Chair

Role Description

Volunteer who will assist the chair with his or her duties of managing the interest group and assume the role of the chair if the current chair is unable to perform duties for any reason.

Roles and Responsibilities

In order of importance

- Represent the chair in his or her absence or if the chair is unable to perform duties.
- Assist the chair in his or her duties.
- Attend all interest group meetings.
- Oversee the operations and strategic projects of the interest group.
- Assist in directing the activities of other officers toward interest group goals and objectives.
- Contribute to the financial planning, goal setting and budgeting for the interest group.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.
- With the Leadership Council president, develop and implement a succession and transition plan.

Role-Specific Skills

In order of importance

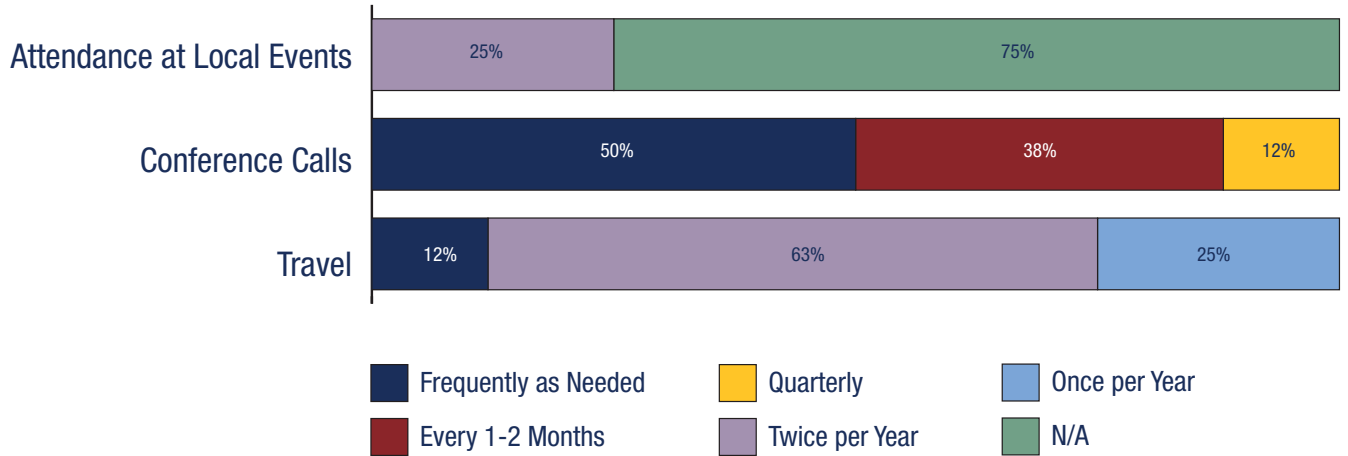
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Resource management
- Financial and budget planning
- Project management

Leadership Skills

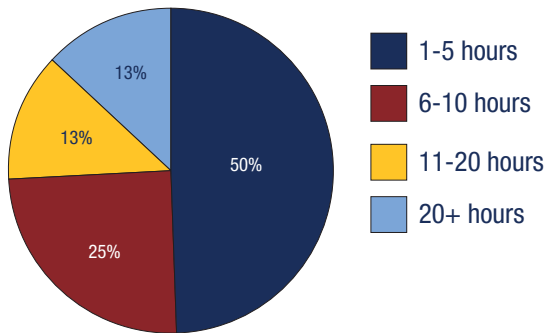
In order of importance

- Active listening
- Networking/relationship building
- Strategic thinking
- Adaptability/flexibility
- Ability to delegate effectively
- Team building
- Public speaking/presentation

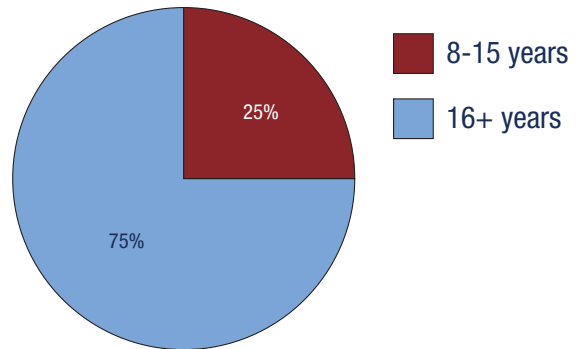
Frequency of Commitments



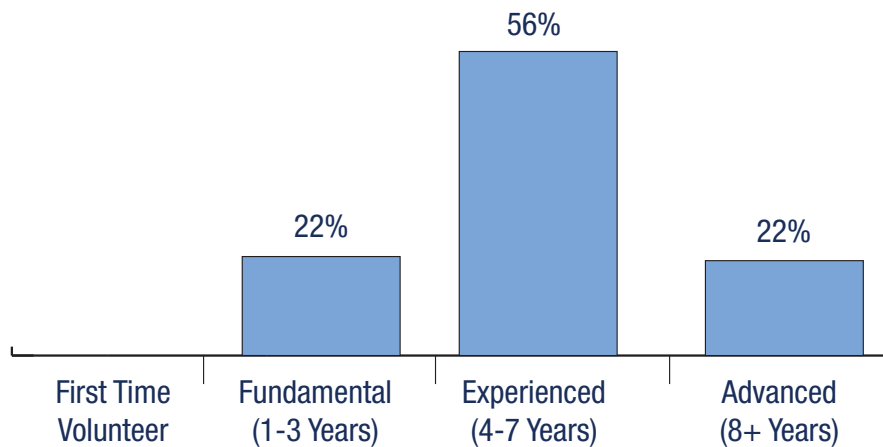
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Committee Member

Role Description

Volunteer who will assist the chair with his or her duties of managing the interest group and assume the role of the chair if the current chair is unable to perform duties for any reason.

Roles and Responsibilities

In order of importance

- Complete projects consistent with the work of the group as delegated.
- Attend all interest group meetings.
- Maintain working knowledge of interest group affairs and initiatives.
- Suggest and critically evaluate initiatives to meet strategic goals.
- Provide reports to the chair about ongoing projects.
- Generate interest for the group among CPCU Society membership.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

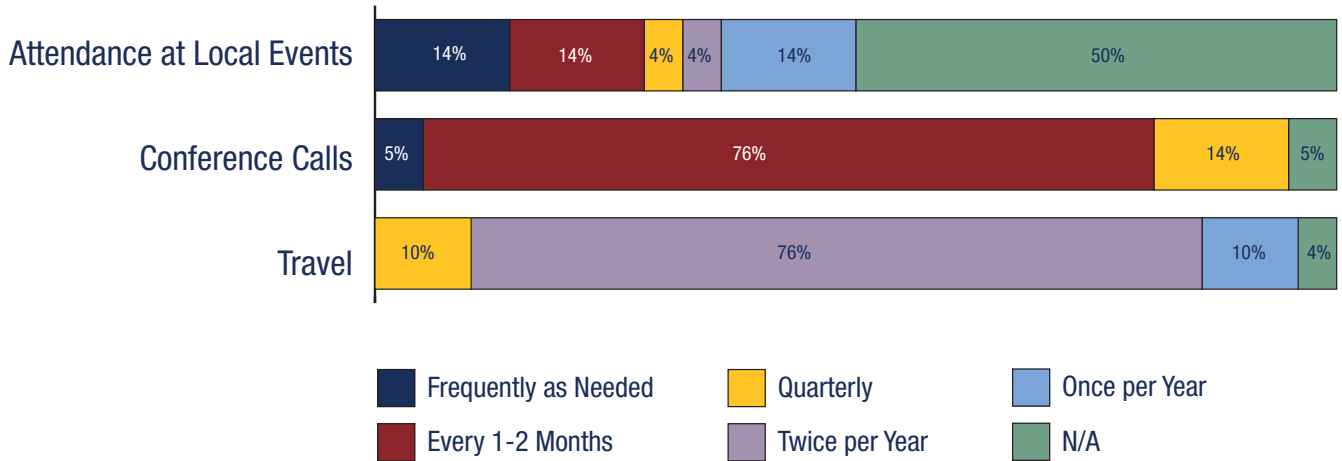
- Project management
- Knowledge of CPCU Society bylaws and mission and of the insurance industry

Leadership Skills

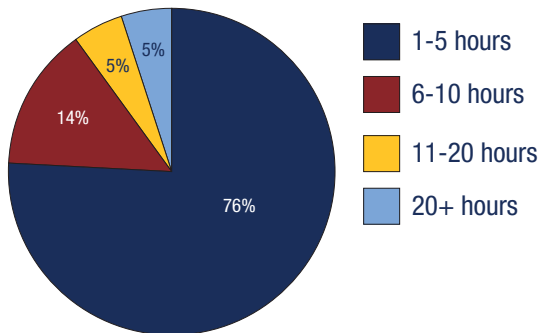
In order of importance

- Active listening
- Adaptability/flexibility
- Strategic thinking
- Team building
- Excellent communication

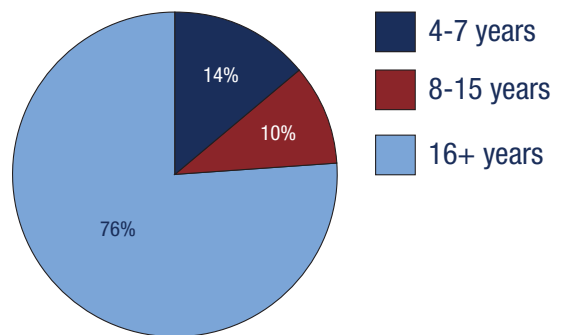
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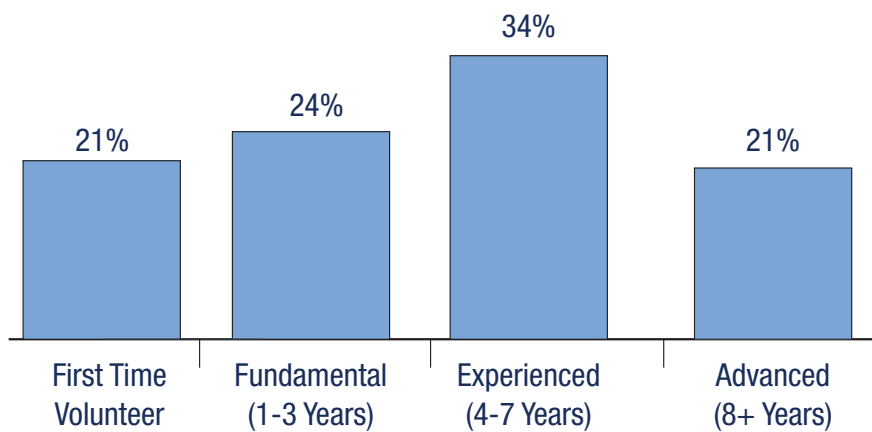
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Webmaster/Social Media Chair

Role Description

Volunteer tasked with maintaining an up-to-date and engaging online presence through the interest group's designated web page(s) and/or social media.

Roles and Responsibilities

In order of importance

- Continually review website content for necessary updates.
- Maintain a channel of communication with officers and members to gather and post appropriate content.
- Post and remove content as needed.
- Attend all interest group meetings.
- Ensure alignment with Society social media, website, branding and best practices.
- Keep abreast of cutting-edge web trends to ensure that the interest group remains technologically up-to-date.
- Develop and implement a succession and transition plan.
- Monitor and aim to increase measurable activity and user interactions for all social media outlets.
- Generate awareness of volunteer opportunities at the local and global levels.
- Identify key online channels for the interest group to establish a presence.
- Keep social media channels updated, ideally on a daily basis.
- Encourage others to comment on posts and share them with others.
- Develop a social media strategy to support the interest group and the Society's vision/strategic plan.
- Attend and support the CPCU Society Annual Meeting and Leadership Summit.

Role-Specific Skills

In order of importance

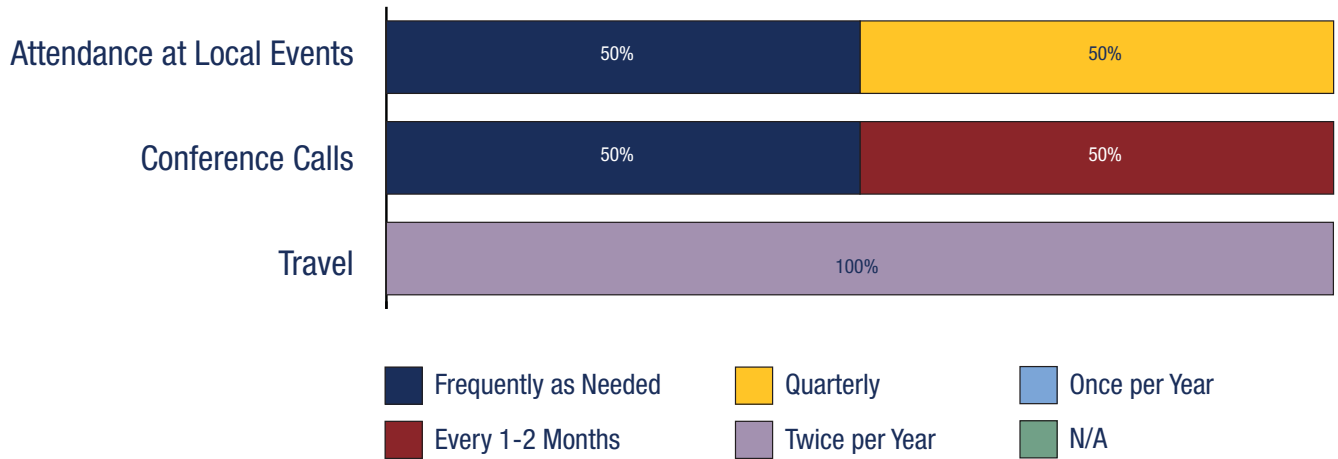
- Exceptional composition and grammar
- Proficient in copy writing, editing and proofreading
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Basic marketing experience
- Proficient use of Microsoft Office tools, such as Word, Adobe Acrobat and Outlook
- Project management
- Proficient use of social media (for example, Twitter, Facebook, LinkedIn)
- Strong understanding of social media and online media trends and best practices
- Strong website software experience (for instance, Drupal, WordPress)

Leadership Skills

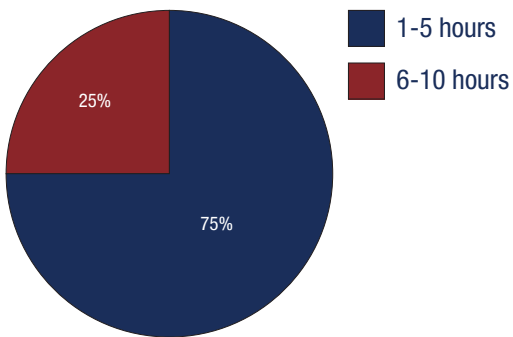
In order of importance

- Active listening
- Excellent communication
- Strategic thinking
- Adaptability/flexibility
- Time management

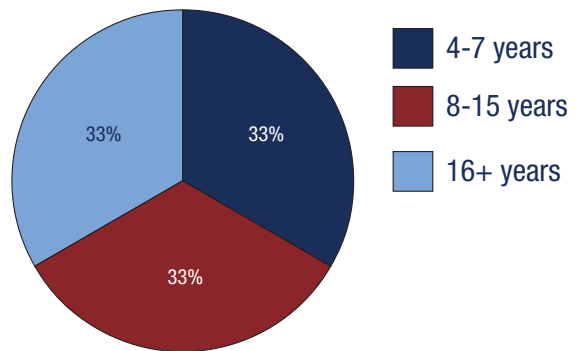
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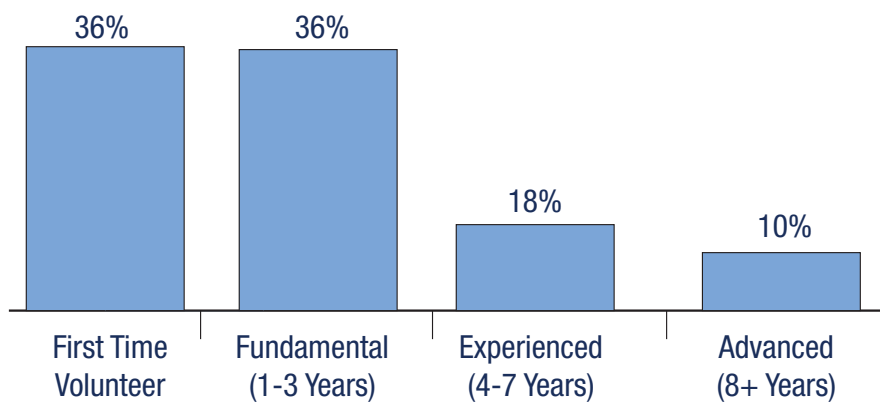
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Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Membership and Education Chair

Role Description

Volunteer responsible for strategically addressing the needs of interest group members, including member experience, educational goals and recruitment/retention.

Roles and Responsibilities

In order of importance

- Develop and maintain an interest group membership plan that ensures continued growth through proactive recruiting and partnering with chapters and the CPCU Society.
- Develop interest group education activities, including the production of webinars and creation of articles.
- Promote the value of the CPCU Society and interest group membership.
- Network with potential Society members and encourage them to join the interest group.
- Develop and implement a plan to recognize member milestones (such as anniversaries or awards).
- Develop and implement a member retention program.
- Review and suggest improvements regarding membership benefits and value on a regular basis.
- Develop and implement membership welcome and engagement plans.
- Answer general membership inquiries; respond to member/nonmember information inquiries and other requests for assistance.
- Act as the primary recipient and distributor of monthly membership reports.
- Maintain the membership records of the interest group.
- Provide communication list/member updates to officers.
- Ensure that members are aware of available services.
- Attend all interest group meetings.
- 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

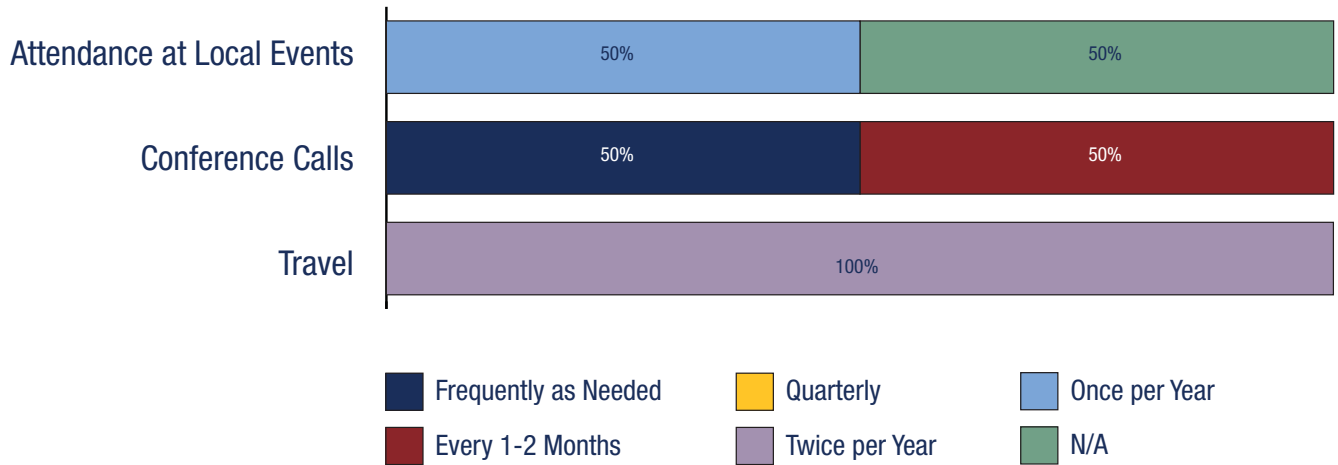
- Knowledge of CPCU Society bylaws and mission and of the insurance industry
- Knowledge of CPCU Society Annual Meeting and other CPCU Society educational offerings
- Project management
- Content and curriculum development
- Proficient in email communications
- Data analysis and reporting
- Proficient use of Microsoft Office tools, including Word, Excel, PowerPoint, Adobe Acrobat and Outlook
- Basic marketing experience
- Online meeting/webinar software (for example, WebEx, GoToMeeting)

Leadership Skills

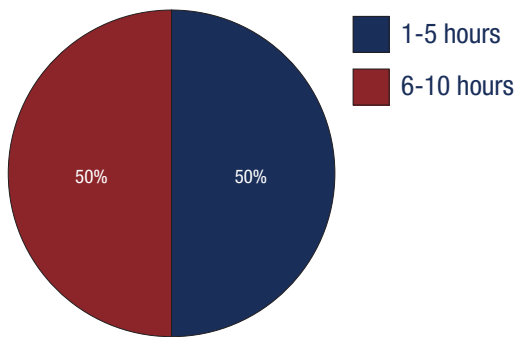
In order of importance

- Ability to motivate
- Active listening
- Excellent communication
- Facilitation
- Networking/relationship building
- Public speaking/presentation

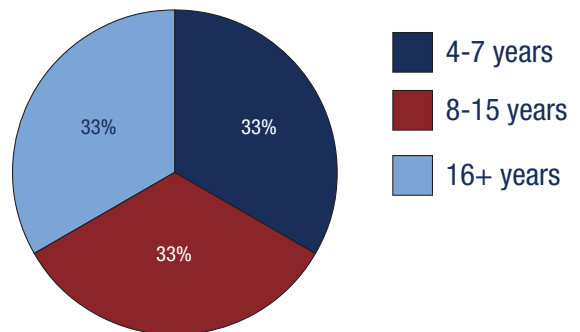
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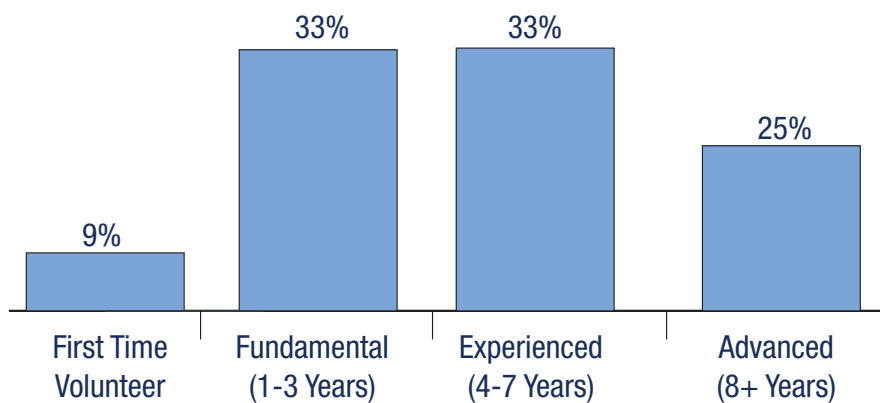
Average Volunteer Hours Spent Per Month on Role



Average Years of Experience in the Insurance Industry



Recommended Level of Volunteer Experience



Volunteer Interest Group Role Description

Interest Group Chapter Liaison

Role Description

Volunteer responsible for conducting all interactions with chapters and for encouraging and engaging new members.

Roles and Responsibilities

In order of importance

- Serve as the first point of contact for chapters.
- Partner with chapters to develop and implement an action plan for engaging new members, reengaging former members and retaining existing ones.
- Partner with chapters to identify needs from interest group.
- Attend all interest group meetings.
- 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
- Knowledge of CPCU Society Annual Meeting and other CPCU Society educational offerings
- Project management

Leadership Skills

In order of importance

- Networking/relationship building
- Facilitation
- Ability to motivate
- Active listening
- Adaptability/flexibility
- Excellent communication
- Strategic thinking