



**2021 Chapter Circle of Excellence Planning and Activity Reporting Form**

<b>2021 COE Planning and Activity Reporting Form</b>					
<b>CHAPTER NAME: Kansas City CPCU Chapter</b>					
<b>ACTIVITIES</b>	<b>AWARDABLE POINTS PER ACTIVITY</b>	<b>ACTIVITY MAXIMUM</b>	<b>DESCRIPTION OF ACTIVITIES</b> <i>(Keep your answers simple and concise, but be specific and supply detail where appropriate to ensure your efforts are recognized.)</i>	<b>POINTS REQUESTED (CHAPTER)</b>	<b>POINTS AWARDED (CHAPTER GOVERNOR)</b>
Minimum of two engagement events per year are held, examples include: -Networking activities -Soft skills development			We plan to us our monthly meetings to hold a soft skills and networking activity. We will also be looking to incorporate these into our I day.		
Chapter website is current, accurate and includes: -Schedule of upcoming events and news -Current year photos of chapter events -Links to social media site			Chapter Website is current and up to date. We share upcoming events, chapter photos and links to social media.		
Social media activities -monthly posts to at least one social media platform			Our Webmaster regularly posts meeting and announcements on Facebook, LinkedIn and twitter accounts.		
Publications - Chapter member has an article published in an industry-based publication and is noted as a CPCU. Examples include Insights, Insurance Journal, The Standard, etc.			We have a Board Member that is looking to publish an article in the Society Magazine.		
Society event sponsorships and recognitions -This applies when the chapter supports Society events such as the In2Risk or Leadership Summit as a sponsor of an event or activity.			We plan purchase an advertisement in the yearbook for In2Risk to recognize our new designees.		
Student engagement activities, examples include: -Gamma Iota Sigma chapter collaboration -Involvement in area educational institutions to create local interest and student members			We plan to work with our local Universities (UMKC) insurance and business students. We will be looking to invite them to meetings and education events.		
Leadership transition/succession plan is in place and implemented. Elements of the plan should include: - Transition checklist - Training plan for incoming officers - Role descriptions for officers/committee members			Officers have been trained for the upcoming 2021 year.		
Volunteer recognition - at least one activity was held during the year.			January's monthly meeting volunteers will be recognized by the past president.		
Community Engagement - participate in at least one community engagement activity. Examples include: -Scholarships - tuition assistance to local students *In2Risk (formerly Annual Meeting) student sponsorship *CPCU Course assistance -Course offerings/CE events -Good works			Due to Covid restrictions we will be looking to do a virtual event or do a donation to an organization in 2021.		
Mentoring Program -Includes member participation on mentor/mentee level -Promotion of program at a chapter event			We plan to engage members on the mentorship program. Emails will be send out and this will be discussed at chapter meetings.		
			<b>Total Points: Chapter Engagement and Visibility</b>		
<b>Chapter Governance</b>	<b>CHAPTER MUST BE IN FULL COMPLIANCE WITH THIS SECTION IN ORDER TO BE CONSIDERED FOR PLATINUM LEVEL</b>			<b>COMPLETED Yes/No (CHAPTER)</b>	<b>COMPLETED Yes/No (CHAPTER GOVERNOR)</b>

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Conduct training of new officers/board members				yes	
Initial chapter operating plan is defined and 2020 Planning and Activity Reporting Form is submitted to Chapter Governor and emailed to Chapter.Services@CPCUSociety.org by February 14, 2020.				yes	
Final 2020 Planning and Activity Reporting Form is submitted to Chapter Governor and emailed to Chapter.Services@CPCUSociety.org by January 31 2021.				yes	
Chapter leader form was submitted to your Chapter Governor and Chapter.Services@CPCUSociety.org by January 1, 2020 and kept updated through out the year as needed.				yes	
IRS Form 990 Filing completed by May 15th				yes	
Members communicated with a minimum of 10 times per year. Examples include: -Chaptergrams, email blasts, social media posts				yes	
			<b>Activities Complete: Chapter Governance</b>		
				<b>POINTS REQUESTED (CHAPTER)</b>	<b>POINTS AWARDED (CHAPTER GOVERNOR)</b>
			<b>Total Points: Provide Relevant Knowledge</b>		
			<b>Total Points: Chapter Operations</b>		
			<b>Total Points: Chapter Engagement and Visibility</b>		
			<b>All Activities Completed: Chapter Governance</b>		
			<b>Overall Points Total:</b>		