

Session Overview

Component relations professionals are constantly challenged to find the best way to recruit and retain good volunteer leaders, basically, how to pitch the "what's in it for me?" value proposition in a quick sound-byte. Today we will examine real-life scenarios that illustrate innovative ways to craft the right incentives to motivate individuals and components to excel.

- Getting To Know You (Quick Intro's)
- What's a Good Volunteer Leader?
- The Sugartown Chapter: Where Has the Sweetness Gone?
Case Study Review & Discussion
- Crafting the "WIIFM?" Proposition
- Your Commitment to Action

Case Study: Sugartown Chapter

Background ... The Sugartown Chapter, founded 60 years ago, is a chartered chapter of a professional association serving the insurance industry. Members join after completing the professional designation. Currently they have 100 members. Programs include monthly dinner meetings and an annual golf outing. Because of the past success of the chapter programs, the chapter treasury has \$40,000.

National provides services such as a web site, leadership conferences, educational workshops and marketing materials for their chapters. At this year's leadership meeting national introduced a new chapter model, model bylaws and a recognition (award) program.

Many of the members work at a regional insurance company. The employer's results were unprofitable last year and a few members received layoff notices. A new insurance company branch opened in the area recently as well. The new employer has relocated many new employees to the area including Mabel and Cynthia who called national to find out about meetings. After 4 months they have not from heard from the chapter.

Current Status ... The Sugartown Chapter operates with a board consisting of a president, president-elect, vice president, secretary and treasurer. The bylaws permit the board to appoint committee chairs. Glen, the current president, is serving for the third year in a row. The treasurer Eric has held the position for more than 5 years. The other offices are currently vacant. Chapter bylaws call for elections to be held in April.

The chapter make-up appears to be changing. According to a survey conducted by the board, there are now many younger members with children.

Monthly dinner meetings are still held where they have always been at the local Italian restaurant. Attendance, however, has dropped off and the board decided to shift to quarterly meetings. So far this year there has only been one dinner meeting to congratulate new designees (new members).

The chapter manager at national has received complaints from members due to the lack of activities. And, a recent audit shows \$3,000 unaccountable.

Because of the drop-off in attendance and volunteering, the board is considering disbanding the chapter or merging with another. The next closest chapter is 50 miles away.

Questions ... Please consider the following questions from both the perspective of a past president who is concerned with the future of this chapter and the national staff.

1. What is your plan to re-build a strong leadership track?
2. What incentives will you use to attract new leaders to take on this task?
3. As a member, what would motivate you to step into a leadership position with the Sugartown chapter?

Old Problems/New Solutions: The Motivation Hour

Session Worksheet

Use this sheet to capture your thoughts, ideas and **your commitment to action!**

A Good Volunteer Leader ...

The Sugartown Chapter: Lessons, Ideas & Solutions

A winning "WIFM?" Proposition ...

My Commitment to Action: _____

About Your Presenters

Ronald E. Arthur, CPCU, ARM ... Ron is currently an association and risk management consultant. His experience includes 11 years with the CPCU Society as chapter services manager; 20 years as insurance company underwriting manager and systems project manager. Ron's association experiences include development of a new chapter model and creating a marketing program to member's employers to promote the value of associations. He received the CPCU designation from the American Institute for CPCU and the Associate in Risk Management from the Insurance Institute of America.

Ron is member of the ASAE component relation's council. He also serves on the American Institute for CPCU grading panel Insurance Operations. Ron also is an active member of the board for the Greater Valley Forge CPCU Society Chapter.

Adrienne A. Bien, MBA, CAE ... Adrienne is the Vice President of the Learning and Networking Center for Medical Group Management Association. She has been with MGMA since 1984. Her responsibilities include component relations, education planning, professional development, leadership training and strategic direction. She has an undergraduate degree from the University of New Mexico with a major in political science and minors in history and Russian Studies. She is a Phi Beta Kappa. Her graduate degree is a MBA from the University of Washington with a concentration in marketing.

She currently serves as chair of the ASAE Component Relations Council. She is active with the Colorado Society of Association Executives. She is a past board member and has spoken at several of their conferences. She is also a free-lance writer specializing in healthcare topics.

Peggy M. Hoffman ... Peggy is a managing partner at Mariner Management & Marketing, an association management company specializing in component relations. As such, they are the chapter office for four organizations (Public Relations Society of America Maryland Chapter; Intl. Special Events Society DC Chapter; Risk Management Assn. Chesapeake Chapter; and the Licensed Professional Counselors Assn of North Carolina) and manage a national association with chapters in the US and Canada. In addition to managing organizations, Peggy provides training and consultation to national associations on component relations. Mariner developed the Dashboard Indicators for Chapter Success which is highlighted in ASAE's new components handbook.

Peggy is currently on ASAE's Component Section Council. In addition to a BA in Communications from The American University, Peggy is a graduate of the association management curriculum of the Institute for Organization Management at Notre Dame. If Peggy wasn't here, it's very likely she'd be out training for her next triathlon.

Old Problems/New Solutions: The Motivation Hour

Favorite Resources for New Solutions

We've assembled a collection of resources that components professionals say they turn to again and again.*

Top Book Picks

The Association Law Handbook, Jerry Jacobs

International Law Handbook, James M Matthews, Roderick N. Matthews

Go Team Go! Strategies for Leading Today's Teams to Victory, Cynthia D'Amour (also check out her site www.peoplepowerunlimited.com)

The (Help) I-Don't-Have-Enough-Time Guide to Volunteer Management, Katherine Noles Campbell & Susan J Ellis, (see Energize, Inc! below)

Episodic Volunteering: Organizing and Managing the Short-Term Volunteer Program, Nancy Macduff

Leadership is an Art, Max De Pree

Exploring the Future: Seven Strategic Conversations that Could Transform Your Association, ASAE Foundation

A Top List of Links

Hoax Busters: <http://hoaxbusters.ciac.org/>

Airline Safety Records: <http://airline-safety-records.com/>

Currency Converter: <http://www.xe.com/ucc/>

Quotations: <http://www.bartleby.com/quotations/>

More Quotations: <http://www.creativequotations.com/>

Free e-books: <http://www.gutenberg.org/>

Rhyming Dictionary: <http://www.rhymezone.com/?loc=bar>

Encyclopedia: <http://www.wikipedia.org/>

Facts & Figures – Census Date: <http://factfinder.census.gov/servlet/BasicFactsServlet>

Children's Song Lyrics: <http://www.bussongs.com/index.php>

Strategy+Business: <http://www.strategy-business.com>

Chapter Resources Center: <http://www.marinermanagement.com/resourcecenter.html>

Energize, Inc. (volunteer resources): <http://www.energizeinc.com>

Top Resources to Tap

ASAE Component Relations Networking Listserv

My Board of Directors, Committee members/chairs and fellow staff!

A good mentor

** Thanks to Components Colleagues for their input: Patricia Corkran, CAE, American Society for Quality; Shelly A. Good-Cook, Cable & Telecommunications Association for Marketing; Adrienne A. Bien, CAE, Medical Group Management Association; Ron Arthur, CPCU, ARM; Lisa Ruane, CAE, American Physical Therapy Association; Suzan Yungner, Urban Land Institute; Peggy Hoffman, Mariner Management & Marketing.*

New Models for Traditional Organizations

Two models that are working at CPCU Society

Suggested Chapter Model

The CPCU Society chapters are the Society's most important local delivery channel to "Insuring our members' success". In 2002 The Board of Governors approved the recommendations for the chapters that cover three important areas – their *structure and organization, operations and policies and national support programs*.

Structure and Organization

Chapters should determine how their leadership is organized. Governance of the chapter should permit flexibility in the officer structure. The model bylaws are available to help permit this flexibility. Officer terms should also be flexible based on the volunteer leaders' time commitment. Smaller chapters may wish to operate by executive committee, with one person designated to handle the finances.

Long standing committees are discouraged. Chapters should decide each year what the goals and needs of the membership are. Use the CPCU Society Strategic Plan and the Circle of Excellence Recognition Program to determine what help is needed each year. Then organize task forces to complete the activities.

Chapter Operations & Policies

Chapters deliver education mainly through meetings. Much time is spent in meeting administration. Education and information should also be delivered through electronic means such as the chapter web site, e-mail and list serves.

Meeting frequency should be flexible. Quality meetings are suggested as an alternative to a certain number of meetings per year. Education should focus on technical; leadership development and helping members manage their career.

The president-elect each year should recruit volunteers as one of his or her primary responsibilities. Clear job or task descriptions should be provided. Train leaders by sending them to the National Leadership Institute Chapter Day each year. Recognition of volunteer leaders is important in obtaining future leaders. Chapters should recognize their volunteer's efforts. The CPCU Society will assist you in this by certificates of appreciation, letters to employers and awards.

Use of technology is recommended by using the chapter web site and e-mail to market chapter programs.

National Support & Programs

The CPCU Society is your consultant to assist you in running an effective chapter. Areas the Society may be able to assist are:

- Educational Resources & Delivery
- Marketing & Communication - visibility & branding resources, chapter communications, web services
- Information Services, Technology, Reporting & Membership Data
- Finance & Risk Management
- Chapter Governance, Training and General Support

For more information contact the chapter services manager.

Old Chapter Model

- 20 % attendance at meetings
- Planning centered on meetings
- Limited volunteer recognition
- Committee structure
- Research
- Good Works
- Programs- technical only
- Quantity of programs

New Chapter Model

- Use technology to reach all members
- Clear mission - Long term planning
- More recognition
- Task forces - use the Circle of Excellence program as a guide.
- Small chapters may operate by executive committee
- Visibility- Connections , grass roots
- Member success – Technical, leadership and career management
- Quality programs vs. quantity of programs

Corporate Connections

Communicating the CPCU Society Message

Employers value the attributes that characterize CPCUs—and they value the qualities that CPCUs bring to their organizations, say survey results released by the CPCU Society.

Driving that point home to industry leaders is the focus of the Corporate Connections program.

According to a 1998 survey of property/casualty industry leaders, respondents cited ethics, experience, knowledge of the p/c industry, and outstanding credentials as the top attributes affecting employee hiring decisions. And, employers associate these attributes with the CPCU designation.

These and other key findings will help prioritize the Society's continuing efforts to build strong support among CPCU employers through the Corporate Connections Program.

What Is "Corporate Connections"?

The Society's Corporate Connections program began as a newsletter in 1995, targeted to property/casualty insurance leaders. In recent years, the program has evolved into a more aggressive campaign that encompasses gathering marketing data, making personal visits to employers, and assuring visibility for Society members.

In short, Corporate Connections is aimed at promoting the Society image, value, and professionalism to CEOs and decision makers in the property-casualty industry.

Corporate Connections 2004

The CPCU Society will take an important message to employers this year—that CPCUs are sought-after professionals valued for their ethical commitment, their skills, their knowledge, and the credentials they bring to an organization. We want employers to know that the letters "CPCU" represent much more than passing a series of exams. Your objective in conducting a Connections visit should be to help employers understand that their CPCU employees *and* the company benefit when CPCUs are active in the CPCU Society.

THE MESSAGE

CPCU Society membership gives employees:

- Access to a wide variety of outstanding CE programs, and an emphasis on continuous learning.
- Quality information through professional publications, and opportunities to contribute through writing and research.
- Emphasis on ethical business practices.
- Opportunities for CPCUs to hone leadership skills, presentation skills, and managerial expertise through chapter/national activities.
- Access to a diverse network of peer professionals.

You can encourage employers to support Society members in several ways:

- Paying membership dues for CPCU employees.
- Providing time off for employees to attend chapter meetings.
- Subsidizing chapter meeting fees, providing meeting space, and other assistance.
- Underwriting the cost of continuing education programs.
- Sending employees to the CPCU Society's Annual Meeting and Seminars.
- Encouraging non-CPCU employees to pursue the designation and provide financial support.

THE METHOD

How will the Society support your efforts to take the Society's message to employers?

1. Utilize the Society's strong chapter network to initiate a grassroots effort to target local companies to gain increased support.
2. Continue to encourage chapters to follow the "Excellence" initiative introduced in 1999 to recognize employer support on a local level.
3. Refine and update the support database regularly, with special emphasis on companies targeted for increased support.
4. Provide company information, handout materials, and follow-up suggestions for CPCUs making Connections visits.
5. Continue to develop member benefits and resources that make the CPCU Society a key component in professional development.

THE RESULTS

A successful Corporate Connections program means that CPCUs will receive support from employers for dues, Society workshops, Annual Meeting attendance, time off for meetings, and more. Success also means increased visibility for CPCUs with the key decision makers in their companies; increased visibility for the designation; and a partnership between employers and the Society to enhance professional development for employees through the many growth opportunities available to Society members.