



Chapter Circle of Excellence Planning and Activity Reporting Form

Activities From: January 1, 2019—December 31, 2019

CHAPTER NAME: _____

CHAPTER CONTACT NAME: _____

PHONE: _____ EMAIL: _____

Please submit to your Chapter Governor and email to Chapter.Services@CPCUSociety.org.

RECOGNITION LEVEL REQUESTED: Platinum (200+) Gold (199–150) Silver (149–100)

CHAPTER COMMENTS: _____

FOR CHAPTER GOVERNOR USE ONLY

RECOGNITION LEVEL EARNED: Platinum (200+) Gold (199–150) Silver (149–100)

CHAPTER GOVERNOR _____

REVIEWED BY: _____

DATE: _____

OVERALL COMMENTS: _____

GOAL #1: Provide Relevant Knowledge					
ACTIVITIES	AWARDABLE POINTS PER ACTIVITY	ACTIVITY MAXIMUM	DESCRIPTION OF ACTIVITIES <i>KEEP YOUR ANSWERS SIMPLE AND CONCISE, BUT BE SPECIFIC AND SUPPLY DETAILS WHERE APPROPRIATE TO ENSURE YOUR EFFORTS ARE RECOGNIZED.</i>	POINTS REQUESTED (CHAPTER)	POINTS AWARDED (CHAPTER GOVERNOR)
• Minimum of two events are held per year. <i>(Must meet minimum to earn any points)</i>	5–10	30			
• Conduct an activity in observance of Ethics Awareness Month	1–5	5			
• Conduct an activity in support of diversity and inclusion during a chapter meeting	1–5	5			
• Membership recruitment rate for candidates (2+ ptc) of 4% by August 31, 2019.	1–15	15			
• Membership retention rate for 2018 designees of 55% by August 31, 2019.	1–15	15			
• Membership recruitment rate for 2019 designees of 47% by August 31, 2019.	1–15	15			
• Membership retention rate of 90% by August 31, 2019.	1–15	15			
			Total Points Goal #1		

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Comments: _____

GOAL #2: Empower Professionals to Succeed					
ACTIVITIES	AWARDABLE POINTS PER ACTIVITY	ACTIVITY MAXIMUM	DESCRIPTION OF ACTIVITIES <i>KEEP YOUR ANSWERS SIMPLE AND CONCISE, BUT BE SPECIFIC AND SUPPLY DETAILS WHERE APPROPRIATE TO ENSURE YOUR EFFORTS ARE RECOGNIZED.</i>	POINTS REQUESTED (CHAPTER)	POINTS AWARDED (CHAPTER GOVERNOR)
<ul style="list-style-type: none"> Leadership transition/ succession plan is in place and implemented. <p>Elements of the plan should include:</p> <ul style="list-style-type: none"> Transition checklist Training plan for incoming officers Role descriptions for officers/committee 	1–5	15			
<ul style="list-style-type: none"> Minimum of one chapter officer attends the Leadership Summit. <p><i>(Must meet minimum to earn any points)</i></p>	1–15	15			
<ul style="list-style-type: none"> Minimum of one chapter officer attends a Regional Chapter Leader Meeting. 	1–10	10			
<ul style="list-style-type: none"> Minimum of one chapter officer attends the Annual Meeting 	1–5	5			
<ul style="list-style-type: none"> Chapter operating plan is defined and 2019 Planning and Activity Reporting Form is submitted to Chapter Governor and emailed to Chapter.Services@CPCUSociety.org by January 31, 2019. 	1–5	5			
<ul style="list-style-type: none"> Final 2019 Planning and Activity Reporting Form is submitted to Chapter Governor and emailed to Chapter.Services@CPCUSociety.org by January 31, 2020. 	1–5	5			
Total Points Goal #2					

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Comments: _____

GOAL #3: Engage Future Generations of Leaders

ACTIVITIES	AWARDABLE POINTS PER ACTIVITY	ACTIVITY MAXIMUM	DESCRIPTION OF ACTIVITIES <i>KEEP YOUR ANSWERS SIMPLE AND CONCISE, BUT BE SPECIFIC AND SUPPLY DETAILS WHERE APPROPRIATE TO ENSURE YOUR EFFORTS ARE RECOGNIZED.</i>	POINTS REQUESTED (CHAPTER)	POINTS AWARDED (CHAPTER GOVERNOR)
<ul style="list-style-type: none"> Minimum of two events per year are held. <i>(Must meet minimum to earn any points)</i> 	5-10	30			
<ul style="list-style-type: none"> Chapter website—including officers, events and news—is current and accurate. 	1-10	10			
<ul style="list-style-type: none"> Members are communicated with a minimum of 10 times per year (for example, via chaptergrams, email and social media updates). <i>(Must meet minimum to earn any points)</i> 	1	15			
<ul style="list-style-type: none"> Student member engagement plan is defined for chapters that are linked to a Gamma Iota Sigma chapter and/or have student members. 	1-5	5			
<ul style="list-style-type: none"> A volunteer recognition plan is defined and implemented annually. 	1-5	5			
Total Points Goal #3					

FOR CHAPTER GOVERNOR USE ONLY

Comments: _____

	Points Requested (Chapter)	Points Earned (Chapter Governor)
Total Points Goal #1		
Total Points Goal #2		
Total Points Goal #3		
Overall Points:		