

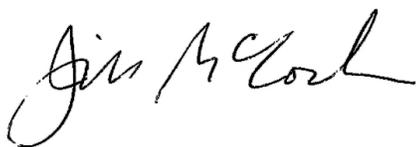
# Plan for the Future

## *A Message From the President and Chair*

The CPCU Society's strength is in its more than 17,000 members who are risk and insurance professionals or students around the globe. Why do members join CPCU Society? We help members find their communities of interest, while staying informed on the latest developments and trends impacting the industry. The involvement of hard working volunteers and members helps the society achieve its priorities, which in turn demonstrates the value of the association.

As engaged membership grows, so does our impact on professional development and creating valuable networking connections in an evolving field. There is no simple formula for increasing member value and engagement, but we believe that a key component in this effort is to ensure that members at every stage of their careers have access to the latest resources they need to be the best they can be for themselves, their employers and ultimately their customers.

In addition to enhancing member value and engagement right now, the CPCU Society also has an obligation to ensure that the association will continue to be relevant into the future. That is why this strategic plan was developed. The strategic plan aligns with the Mission Statement to position the association to make progress toward the Vision Statement for our industry. The plan includes goals (the desired outcomes) and objectives (methods or approaches for achieving the goals) that have been prioritized during the 3-year timespan. It's important to note that these do not reflect the totality of our activities. This plan was developed by the society's Leadership Council after a nearly year-long process of researching member, potential member and lapsed member needs to determine the priorities. We have ambitious plans and it will take dedication and hard work by the society's leadership, membership and staff to execute them. I am confident that we are up for the challenge.



Jill D. McCook, MEd, CPCU, CLU  
2019 CPCU Society Leadership Council President and Chair



# CPCU Society Strategic Plan 2019–2021

## Our Vision

We will be the premier inclusive community of risk and insurance professionals who shape the future of the industry.

## Our Mission

To provide knowledge and leadership opportunities for a global community of risk and insurance professionals in order to advance the industry and benefit those they serve while adhering to the highest ethical standards.

## Our Strategic Initiatives

### GOAL #1

**The CPCU Society will be known as the premier community of risk and insurance thought leaders.**

OBJECTIVE 1.1: Increase relevant, innovative educational offerings that result in increased participation and generate new revenue

OBJECTIVE 1.2: Increase visibility through partnerships with other industry organizations.

OBJECTIVE 1.3: Increase communication of our value proposition through multiple channels.

OBJECTIVE 1.4: Develop strategies to engage the next generation.

OBJECTIVE 1.5: Revamp events to support goals.

### GOAL #2

**Industry leaders recognize the CPCU Society as inclusive, with a specific identity and a wise investment for their employees.**

OBJECTIVE 2.1: Increase communication around the value of membership.

OBJECTIVE 2.2: Increase awareness of the correlation between CPCUs and business results.

OBJECTIVE 2.3: Promote membership through enhanced visibility of the CPCU designation and the Society across the RMI industry.

### GOAL #3

**A more diverse membership has increased, as has the conversion of new designees.**

OBJECTIVE 3.1: Increase membership to 30,000.

OBJECTIVE 3.2: Strengthen value proposition and provide relevant benefits.

### GOAL #4

**The CPCU Society is recognized as a leader in social responsibility.**

OBJECTIVE 4.1: Explore how to involve and engage membership in a social responsibility initiative.