InSITE

SITE
SOCIETY OF INSURANCE TRAINERS & EDUCATORS

August 2017

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President's Message

Sandra Colley, SITE President

Every time that I attend SITE's annual conference, I walk away energized by the amazing sessions and the inspirational insurance professionals. The 2017 annual conference in San Antonio was no different.

I attended numerous sessions during the three day conference. A few of the topics included: Adjuster CE Requirements, Aligning Key Performance Indicators with Specific Business Objectives and Goals, and Project Charter in 45 Minutes. I'd like to clone myself for these conferences to attend more sessions! Leaving the conference, I was armed with tangible resources and ideas to bring back to my training team to help implement new initiatives and enhance current organizational activities.

In addition to the tangible resources, I met individuals involved in initiatives similar to those of my company. We exchanged information, so we could contact each other when we hit bumps in the road. The Annual Conference is a dynamic example of what SITE is all about, which includes stimulating the growth and professional development of its members to benefit their respective insurance companies through research and the exchange of ideas related to education and training.

A quote I shared during my President's acceptance speech was:

> "When you focus on problems, you'll have more problems; when you focus on possibilities, you'll have more opportunities".

Similar to the rest of the insurance industry, SITE has "problems". One problem is attracting younger professionals to our organization. Another problem is that insurance companies continue to reduce expenses to the bare essentials, which means that employee memberships to external organizations are perpetually at risk.

However, as indicated by the quote, let's begin to look at our problems as possibilities for improvement and new opportunities. SITE has a dedicated membership group that encompasses over 200 insurance companies, 1,000 insurance professionals, and thousands of years of knowledge in learning & performance. SITE is the *only* organization, of which I am aware, that focuses on the insurance industry AND the learning & performance professional. Considering these assets, we should be able to plan strategies to attract younger members and clearly convey the value of membership to our employers.

Joining SITE has impacted my career positively in many ways, including new knowledge, a broader network of industry contacts, and access to resources and wisdom

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New Hire Curriculum

Patrick Wraight
Director, Insurance Journal's Academy of Insurance

One of the toughest days in an employee's life is often the first day. It's especially hard if you add a couple of common factors to it. Moving to a new city increases the stress of a new job (especially moving with a family where all of the adults get up on Monday morning to start a new job and the kids all go start at a new school). Let's make it more uncomfortable. Let's say also that the first day in the new job is the first day in a totally new (and complicated) career field, like insurance.

People that get into the IT field do so on purpose. They go to school or they take certification courses and they prepare for it. CPA's do the same thing. Even politicians don't usually just happen on that career field. They plan on it for years.

On the other hand, often people don't plan to end up working in insurance. That's my story. I ended up in insurance because that was the first place that hired me when I needed a job. I'm glad I did it, too. My career in insurance has been rewarding and profitable. Yet, I remember that first day in a new town and new to insurance.

Here's the problem. Most of us have forgotten what it was like to be brand new at something and so when a new team member shows up on that first day, we may not have prepared to take them from where they are to where they need to be to become the right person in the right place at the right time. Isn't that why we hired them in the first place? Let's talk about the idea of a comprehensive new hire program.

What should we expect from a new hire program? A new hire program should set up the new team member up so that they can start walking when they join their team. We should walk with them as they begin to get their legs under them. We should expect that they trip and fall some. We should help them back to their feet, reassure them that everyone trips now and again. We should set them up so that in time, they're running the marathon with the rest of the team. Even better, they're leading the pack.

What should a new hire program include? We recommend a mix of:

- Observable culture
- Practical scenarios
- Academic study
- Refresher checkpoints

Culture has been a buzz word for the last several years. Companies post their core values and their mission statements all over the place. It's as if posting information about the culture makes it so. Here's the problem. Most of the time, that's just corporate gobbledygook. If you're going to include company culture in your new hire program, it can't be done just by playing the recruiting video and asking people to sign the core values statement.

Sure, play the video. It will help introduce the team member to the company. After that, find some people at all levels of the company that can spend some time throughout the new hire curriculum. Some of them can be short conversations. It would be great to include a lunch with some folks that have been around for a while and others that are recent new hire graduates.

If you can get the senior leadership to be involved, that can help even more. The more people who exemplify the culture that you can find during the process, the faster and better the culture will be communicated. Learning culture isn't an event, it's a process. It's something that's picked up along the way. It's carefully cultivated over time.

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Practical scenarios are where you introduce your new team member to what the work looks like. You should create scenarios that are straight forward, solvable, and common to start with. As they progress through the curriculum, the scenarios should get a bit more complicated, but not beyond what you would expect them to experience in their early walking stage. This is where you introduce them to your systems and give them the basic navigation training they will need. You can start these scenarios even before you begin your insurance related training. They won't need much insurance background to begin to familiarize themselves with common, simple situations.

Your practical scenario training is also a great place to provide mentoring and development opportunities to your future training team members (the people who are doing the work today). Bring in someone with a great attitude and a desire to grow. They will provide those helpful tips that only those who are working in a system every day knows. They may even give the new team member a copy of their "cheat sheets" that helped to make them one of the company stars.

Some people don't like the word academic, but I can't find a better word for it. You need to invest some time in the classroom. It doesn't have to be boring. It doesn't have to be lecture. It doesn't even have to be in a traditional classroom, but it does need to be academic. Your new team members need to know some things about insurance so that they can put the pieces together later. This is also where you can ignite a thirst for continual learning in your team members.

Rather than using your sparse resources to create basic insurance education, there is a ton of great educational resources that have been vetted and used by companies and individuals for years. What follows is not an endorsement of any particular product, but a list of some vendors that you might consider as you develop your curriculum.

- The Institutes' AINS designation program. You can start your new hires with AINS 21 and split it into the three smaller segments. That gives them a basic introduction to insurance (probably more than they'll need for their first role) and starts them on the path of their first designation. For more information, CLICK HERE.
- The National Alliance CISR designation program. You can either bring instructors into your company or set up your team members for their self-paced online instruction. You can start them with classes that apply directly to their role, and branch out from there. For more information, CLICK HERE.
- Insurance Journal's Academy of Insurance provides online learning through weekly webinars. All webinars are recorded and available on demand. You can access individual webinars. There are also individual and group memberships available. For more information, CLICK HERE. In the spirit of full disclosure, this is where I work.

Refresher checkpoints don't have to be all that formal, nor do they have to be traditional learning events. Try this idea. Schedule monthly meetings with new hires that have been with the company for less than a year, 18 months, or 2 years. Some of them can be formal learning events, where you have a speaker come in, or teach a new skill. Some of them can be simple informal conversations about how things are going, what the challenges are, what wins have they had, etc.

The idea is to continue the relationship with the new hires and help them to build relationships with others that are about to walk where they just walked or those who have already walked where they are walking today.

One last thought about new hire curriculum. Take time to get feedback. Ask the team members what they thought about it. Ask their leadership team what they thought about it. Ask your team what they thought about it. Get continual feedback from anyone involved in the process. Once you get the feedback, be prepared to make changes. Continually question whether you've done enough, or done it well enough. Continually tweak it so that it gets better.

We only get one shot at putting our new team members on the best path for their time with us. If we don't intentionally set them up to succeed with us, they will eventually set themselves up for success somewhere else.

Are You Ready for Some Role Training?

Gregg T Golson CPCU, ACS, AIC, AIM, AINS AIS, API, CSM
Bracken Engineering – Vice President of Marketing and Strategic Planning

While general training works well for diverse audiences and onboarding of new insurance staff, it's not the best tool for technical training for specific groups. Are you ready for some role training? One of my favorite tools to make role training (and role play training) interesting and more fun is to use a sports metaphor.

Take combining adjuster good faith (or avoiding bad faith) claims training with football for example.

First, let's start with the basic football positions and how they interact:

- Adjuster is the Quarterback
- Claims Supervisor is their Position (Quarterback) Coach
- Claims Manager is the Offensive Coordinator
- Claims Director is the Head Coach of the entire team
- In-House Counsel is the Defensive Coordinator
- Underwriting team is the Defensive Line
- Subrogation, Special Investigative and Salvage teams are the Offensive Line
- Vendors like Engineers and Independent Adjusters are the Offensive Backs
- Mitigation, Board-up, and Restoration teams are the Wide Receivers

Next, let's discuss some rules of a game:

- Holding – when an adjuster takes too long to decide on coverage and sits on the claim
- Intentional Grounding – when an adjuster doesn't explain to an engineer their question properly before sending an assignment to inspect a fire loss
- Off Sides – when an adjuster acts too fast and doesn't plan before acting
- Illegal Roughness – when an adjuster writes or says something emotional that can be detrimental to the claim or claim process (that drives an insured to seek counsel or hire a public adjuster)
- Taunting – when an adjuster is too cocky and takes a 'my way or the highway' attitude. This behavior can lead to bad-faith issues, suits and severely irate insureds on a regular basis.

Let's discuss the parts of a game:

- Kick Off – when the claim is received, who gets the information and how is it conveyed to the adjuster so they are prepared when making the initial contact
- Punt – when the claim reaches a stage where management decides to pay, regardless of the adjuster's opinion due to business reasons
- Passes and Hand-offs – when the adjuster assigns someone else to handle a technical or specific part of the claim. This could be an engineer to determine structural integrity, someone to tarp a roof or board up a home, or an origin and cause specialist to determine how a fire occurred.
- Half-time – We get the opportunity to adjust our game plan based on how the game is going. Adjusters may need to re-evaluate how they handle the balance of a claim if a pushy contractor enters the scene or they determine parts of a home they thought needed repaired must be replaced due to building code regulations.

End of a game:

- We lose – we overpay the claim due to a fumbled diary or a missed part of an investigation. We apply a lesson learned session to review our claim so we can improve for the next one.
- We tie – We slightly overpay due to a missed calculation or not having strong negotiation skills.

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We seek training to improve our game.

- We win! We complete a timely thorough investigation, communicate clearly and promptly throughout the claim, and pay what we owe…fast. We also apply what we learned to the next claim.

Lastly, let's discuss how the traits of a winning quarterback compare with an awesome adjuster:

- They are both field leaders. The quarterback owns the field and leads his team to score a TD. The adjuster is the field leader on large loss fires for example. They examine the loss sight, direct board-up and mitigation, pay advances to the insured and direct all parties to get the home repaired promptly and correctly. Their TD is a satisfied customer and a properly repaired home.
- They both study to prepare for their game. Quarterbacks study film on their next opponent, while adjusters attend conferences on fraud awareness and training on better estimating skills.
- They are professional on and off the field. Quarterbacks must face the press after a losing game, know they are always being watched and are considered role models. Adjusters sometimes, must face irate insureds, unpolitic contractors, and bosses under pressure to close claims and keep costs in line.
- They both must have strong communication skills. The quarterback must have confidence in the huddle and bark out the play at the line of scrimmage. The adjuster must be able to communicate clearly with insureds, agents, attorneys and contractors both verbally and in writing. They should be able to explain claim procedures and policy language without using industry jargon that would confuse listeners.

The football metaphor is an excellent tool for role training. It also lends itself to fun role playing opportunities during the technical training. Adjusters can take turns being the quarterback and talking through proper handoffs and passes to vendors. They can discuss how the underwriting team, for example, gives them pre-loss information valuable to handling a claim. Lastly, they can discuss how game plans relate to claims and catastrophe plans.

If you are planning some technical training, don't forget to bring your football, soccer or tennis ball.

Save the Date

2018 Annual Conference

Spokane, Washington

June 24-26, 2018

As a training professional in the insurance industry, this is one learning opportunity you cannot miss!

Come with your learning appetite as this conference offers exceptional educational programs, meaningful networking, and professional development opportunities.

Registration opens October 1st for Exhibitors and November 1st for Attendees.

For more information visit our website https://site.memberclicks.net/annual-conference

Teaching Insurance Coverage Analysis to Millennial Professionals

Storm Wilkins, Esq., CPCU, ITP, Assistant Professor
Risk Insurance and Healthcare Management Fox School of Business
Temple University, Philadelphia, Pennsylvania

As a full-time college professor, it is my privilege to teach insurance contracts classes to undergraduate Risk Management and Insurance majors. The courses include a dozen commercial property and casualty policy forms. At the conclusion of the course, I ask the students, what made learning about insurance coverage easier and more effective. The students' insights may provide guidance for corporate trainers tasked with developing coverage training for their organization. Their most frequent responses follow:

Policy
First and foremost, the respondents all agreed that while a textbook or some other writing can break down the policy provisions, the most effective method for building their competence is to have them review and apply *actual policy language* to an issue.

DICE or some other systematic method
An optimal instructional design in this area should also provide learners with a systematic method for coverage analysis. The **DICE** method as many readers may recall involves reviewing the **D**eclarations page, then the **I**nsuring agreement, then the policy **C**onditions and finally the **E**xclusions. All of the millennial survey respondents agreed that having specific instruction that outlines a systematic policy review process increased their confidence in their ability to do their job.

Ongoing
Another attribute of coverage training is that "It requires studying on a ***regular*** basis to ensure you get it correctly." In the corporate environment, this may translate to creating a "coverage culture." Instead of having a training class one day and not considering the skill again until the next session, coverage analysis skill-building must be a part of the environment.

Interactive and Collaborative
Fourth, an instructional design which focuses on a lecture-style format with an instructor merely imparting knowledge to millennial learners tends to be ineffective. They want to ask questions and receive answers during the session. Otherwise, they are not engaged.

In addition to interacting with the facilitator, the millennial learners also want to interact with one another. When asked, "*what in-class activities assisted you most in learning to critically analyze policy coverage?",* nearly every respondent praised one of the myriad of collaborative exercises in the course. For instance, students provided feedback such as: "I liked it when we worked in pairs for the CGL policy limits question." and "I usually study in groups. Talking out loud is the best way."

Resources
Aside from favoring teamwork, millennials also favor technology in their learning environment. The advantage is that the millennial learner is very comfortable accessing

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Automated New Hire Toolkit to the Rescue!

Evelyn Jorgensen,
Claims Learning Services Manager
Selective Ins. Co. of America

As a member of a small claims training team, we've struggled to create onboarding resources for our claims new hires, many who work out of their homes. If your company is anything like ours, there are numerous resources via the company Intranet across many different areas. Examples include information on the Human Resources page; Travel and Expenses; Compliance, Microsoft system info …not to mention the technical information to include for claims!

As systems and processes get changed, we found that providing a physical binder meant that learners may rely on outdated material. Also, it did not provide a way for new hires to 'link' to the pages needed on our Intranet/SharePoint pages.

Enter the "Automated New Hire Toolkit". This toolkit acts as a Table of Contents (TOC) that is specific to the claims role. New hires can access it from our Onboarding site and save the most recent version to their desktop for easy access (which means they have the most up to date information!). The TOC is divided into sections aligned with company general information, systems and our claims line of business pages. This allows the new hire to easily "click and link**"** to various areas for additional information, access to online learning, job aids etc. without wasting time searching for information.

Feedback from our new hires has been extremely positive! They find it simple to use and is a 'just in time' resource that saves time for our adjusters to access the information they need most at their critical moment.

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information on the web in order to tackle a coverage question. The disadvantage is that not all of the information available is relevant and reliable. Therefore, an integral part of training and development in this area is to expose the less experienced professionals to appropriate resources for answering insurance contract issues. The instructional designers may want to work with the subject matter expert to develop a good list of reliable resources for solving future coverage issues.

Hypothetical Questions and Games

Finally, the respondents all agreed that the use of hypothetical questions and games made learning about insurance policies much easier. The students loved questions which were "the crazier the better." They enjoyed real life examples which were in essence ripped from the headlines. These types of questions can also enhance the "coverage culture." The training and development professional can work with the subject matter expert to have daily or weekly coverage questions. Teams could address the issue for a few minutes each day or week. At the end of the month or the quarter, there could be prizes for whichever team earned the most points with their responses.

Coverage training lends itself to a wide variety of other games and learning exercises. For instance, students in my classes compete in "issue spotting" exercises where a long coverage scenario is presented and students compete to see who can identify the most number of policy issues presented by the facts.

The most important aspect of designing effective insurance coverage training for the millennial learner is to make it fun!

New Hire Training: What they really need to know about your organization!

Kate Manthey

The focus of this InSITE edition is role-specific training. Something my students are very familiar with, as their new employers train them for roles in underwriting, claims, business process and the like. Many times, onboarding efforts also include information on company culture and benefits. But how many onboarding programs actively help the new hire connect to their impact on organizational results?

The bigger picture refers to more than the general company overview, where VPs explain the purpose of their divisions. Instead, help new employees discover why their role is vital to others and to the organization. Let's help them identify organizational partnerships and how their role depends on (or is accountable to) another. Some companies likely expect new hires to figure this out themselves over time, but it may be helpful to have a mentor in the process.

You may want to steer your new corporate investments away from those who may potentially be negative (they've been in the same role too long, they don't like what they're doing, they don't like working, etc.) These informal relationships are part of your new hire's continued development, so it's key to keep things positive all around.

Your new hires – especially the fresh out of college hires – are into relationships. Big time. Others may feel that new employees can't socialize without technology, but I think they are experts at using technology to build relationships and networks. Prior generations had the in-person relationships established before the online relationships; the generations going forward will reverse that process. Your new hires want very much to understand their role, who they can count on (and are accountable to), and how they directly contribute to organizational success. There is some compelling evidence indicating that if they can't determine their purpose in the organization, they will move to another where they can establish a clearer purpose.

Why don't we build it into their personal development and/or performance plans? Give them a couple of hours each week to sit with other departments and ask questions. Let them discover how the information they create/modify is used by others. Let them identify concerns with processes that have likely existed before they did – they might have an idea of how it can be streamlined.

Here's another thing about some of your recent hires: They would appreciate an opportunity to contribute their thoughts and to know that these ideas are truly considered. This approach could also help them identify plans for future roles within your organization. As much as we don't want to give up the 'good ones', it is possible to smother them if they are given no opportunity to grow.

Let's face it – that's what we hired them for, right? Do we hire those who take forever to understand the business? Do we hire complacent employees who are ok with doing things the same way day in and day out…because that's how it's always been done? Do we hire people who won't speak up if they see a better way to do something? NO!

So let's encourage our newest staff, those with the most open minds and fresh ideas, to discover how their unique piece fits within the organizational puzzle and make it an even better picture!

Eastern Region

Marcia Moore, Eastern Region VP

518 years- the years of insurance experience in the room at our Eastern Region breakout meeting held in June at the annual conference in San Antonio. Our members shared their years of experience as well as personal passions. We all enjoyed Mary Bruggeman's ice breaker which was a comical way to get to know everyone. Our regional meeting is just another wonderful opportunity to meet new people and reconnect with old friends.

85%- the percentage of our Eastern Region members who signed up to share their valuable experience by volunteering for a SITE engagement activity. Our members are the driving force making SITE such a rewarding interaction. Many thanks to all of you for volunteering to write an inSITE article, lead a Huddle or webinar, and/or support a committee this year. We will be reaching out to other members soon to utilize your talents.

60 minutes- the minutes of professional development available in the monthly SITE webinar. Big applause goes out to our very own Michael Pearsall for his July Webinar "Teach to Remember - The Prehistoric Brain in the Modern Workplace." What a great session!

2 people-the number of State Directors we have assisting this term in coordinating our member engagement activities. Mary Bruggeman is staying on another term as our Ohio State Director. We all value and appreciate Mary's contributions and leadership. I would like to welcome Kelly Durham of Markel Corp as our WV/VA State Director. Kelly is an excellent example of a new member embracing the professional development opportunities afforded by SITE.

2 events-SITE Socials already scheduled

Looking forward to another rewarding year. Please contact me if you have any engagement activity ideas.

siterveastern@insurancetrainers.org

Central Region

Kate Manthey, Central Region VP

It's an exciting time to be in little ol' Oshkosh, Wisconsin. The skies above are literally buzzing with planes and other aircraft participating in the Experimental Aircraft Association (EAA) convention this week. Our usual population of just over 66,000 people suddenly grows by a half million just for this event. I don't know how many actually stay in housing at UW Oshkosh, but I'm seeing license plates from all over the country and Canada.

The beauty of an air show is that you can see some of it without even venturing to the festival. Whether you like flying or not…it is SO cool to walk outside and see several planes flying in formation or daredevils in stunt planes. If you've ever seen the Blue Angels in person, you know what I mean!

So what's the beauty of SITE? We don't fly like superman, but we do solve a lot of problems. Each of us has a unique gift that benefits other trainers or our own employees. And if you do training for the masses, you are a magician, because people show up for your training and – poof! – everything always works out fine. Participants usually have no idea of what it took to create such a seamless event!

Our organization exists to provide a venue for collaboration between us; using the expertise of others helps us improve our own efforts. That is my mission this year – to foster more collaboration in our region.

My first project is to build off my SITE group posting and create a virtual huddle around webinar tools. Virtual huddles, although sponsored by a region, are not unique to that region. This is a facilitated online discussion, not a webinar. Any who sign into the virtual huddle are welcome to share their thoughts with the group and ask/answer questions. So if I tap you on the shoulder (via email) to participate, I hope that you will consider helping me with our SITE mission!

If your company would consider hosting a workshop and/or social onsite, it would be great to have some opportunities to

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collaborate in person, also. Let me know what you're thinking and I will gladly help with coordination and promotion of the event. It doesn't have to be an all-day affair; even a 2-4 hour workshop would help members from other organizations justify the time and travel to meet with fellow SITE peers! Send me an email if you'd like to bat some ideas around…

There are many other ways to get involved with SITE; I sent a message to our region back on July 6 describing some of them. The SITE Group in LinkedIn is also a great way to stay connected and touch base with other members during your travels.

Much help is needed with ongoing SITE initiatives as well as with the sub committees working on the next annual conference – contact me if you'd like to know how to get more involved. Even writing a short little article for the next InSITE would be helpful…more contributors mean more variety in content – and more value for members. I am happy to help with ideas and topics – just let me know!

Western Region

Helen Gomez, Western Region VP

Fantastic, fabulous friends…..three words to describe 2017 SITE conference in San Antonio, Texas. At our regional meeting great connections were made! It was such a pleasure meeting Shannon Marbet from AAA, Angie Davis, Carol Williams and Sheila Plettenberg from Payne West, Kelley Hurley from Nautilus Insurance and Julia Bertilacchi from Sedgewick. We had a great time getting to know each other and reviewing the fabulous opportunities within SITE.

State Directors – Thank you Angie Davis & Carol Williams for volunteering to be our state directors for Washington and Montana. I look forward to working with both of you to keep our Western Region members involved thru various networking opportunities! Our region consist of 99 members from 12 states. If you would like to get involved with meeting others from your state, please reach out to me to discuss volunteering as a state director.

TTT - I am so excited to be hosting Train The Trainer in Aliso Viejo, CA and I cannot wait to meet Angela Benerjee , Kate Jaehnke from Acuity and Steve Yappel, Cynthia Rodriguez and Renee Davis from Allstate. Beautiful weather will be in store for you and there will be an opportunity to network with others at our SITE social being held Thursday night at the Homewood Suites Hotel.

By The Numbers – 99 members strong spread throughout 10 states – who do you know…AZ – 18, CA – 21, CO – 9, ID – 3, KS – 1, MT – 9, NV – 1, OR – 5, UT – 1, WA – 31. Let's grow our region by 10% by the 2018 SITE conference!! Share our Mission – The Society of Insurance trainers and Educators exists to provide professional development to Society members through programs, networking opportunities and services. So I say again….”Who Do You Know” we have so much to offer as an organization!!

So “XSITED” to hear from you.

Southern Region

Sherry Moor, Western Region VP

Howdy from hot and humid Florida. Summer is in the air and I'm looking forward to some fun in the sun (with excessive amounts of sunscreen and a hat of course).

We have just finished our annual conference, which was held in San Antonio. I think it was actually hotter in Texas than in Florida! I certainly enjoyed a few frozen margaritas to help cool off in the summer sun (the Prickly Pear margarita was amazeballs).

If you didn't get the chance to join us at the conference then you missed out on some really great sessions. I'm still reviewing my notes from the sessions I attended so I can incorporate the new information into my life. As always, SITE put on a great conference with a lot of fantastic speakers, valuable content, and a lot of fun mixed in.

Our Southern Region meeting was a lot of fun as we tossed around a thumb ball as an icebreaker and learned some cool

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things about our fellow Southern region peeps. We also discussed the many ways that you can get involved in SITE.

You've heard me talk about these before, so I won't keep badgering you about it. If you would like to get involved let me know. It's a great resume builder to say that you have published an article, hosted a webinar, been a state director, or even join the board! I'm here to help you if you want more information on how you can get more involved in your organization. The more you put in, the more you get out of it.

One thing that was truly impactful for me at conference this year was visiting the Alamo. I lived in Texas as a child and I remember the stories, but to actually be there was humbling.

I also really enjoyed our visit to the Menger hotel, right next to the Alamo. This hotel is really old and is practically a museum itself. On the wall was a plaque with quotes by Theodore Roosevelt and one quote in particular moved me and gave me inspiration to be bold and try new things. I will leave you with that quote. I hope it is as inspiring to you as it was to me.

"Far better it is to dare mighty things, to win glorious triumphs, even though checkered by failure, than to take rank with those poor spirits who neither enjoy much \nor suffer much, because they live in the gray twilight that knows not victory nor defeat." ~Theodore Roosevelt~

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provided by learning & performance professionals across the country and internationally. As your President, I am dedicated to moving our organization forward by ensuring that each of you can articulate to your company the benefits you (and the company) enjoy as a member of SITE.

If you have suggestions for making SITE an even more valuable organization, please reach out to me. Remember, SITE is a purely volunteer organization. This means that your ideas, time, and resources are SITE's greatest assets. We rely on your membership to continue to position SITE to be the "go to organization" for insurance training professionals.

I look forward to another great year on the books for this organization!

Time To Get Social

Evelyn Jorgensen, Member Services VP

Are you attending an event where you'll connect with other insurance trainers and educators? Do you live in an area where there are numerous insurance companies, agencies or other training related vendors? SITE Socials are not only a great way to connect with your SITE member pals, but also a wonderful way to introduce SITE to potential new members!

Hosting a SITE Social is as easy as A B C.

A. Pick a date, time and venue for the social. If needed, reserve space at the venue.

B. Send a note to your Regional Vice President (or me!) letting them know the date, time, place, as well as your contact information. SITE will take care of the marketing for the social through e-blasts.

C. Attend the event, pass out SITE SWAG (we provide), take photos and collect the names/emails/and phone numbers (we'll send you a sign in sheet) of all attendees. Oh...and of course, have fun!

SITE will pay for appetizers (up to $50 to be reimbursed to the host). Individuals pay for their own drinks or any other food they'd like. After the event, send the receipts (as well as the sign-up sheet mentioned above in C) to the Regional Vice President to begin the reimbursement process.

Ready to GET SOCIAL? Contact your RVP today!

Helen Gomez — sitevpwestern@insurancetrainers.org

Kate Manthey — sitevpcentral@insurancetrainers.org

Sherry Moor — sitevpsouthern@insurancetrainers.org

Marcia Moore — sitevpeastern@insurancetrainers.org

Upcoming Programs and Events

Train the Trainer

September 21-22, 2017
Liberty Mutual
120 Vantis Drive
Aliso Viejo, CA

April 24-25, 2018
Great American Insurance Group
301 E 4th St
Cincinnati, OH
Register by January 25, 2018

Annual Conference

June 24-26
The Davenport Grand Hotel
Spokane, Washington
Registration opens November 1, 2017

Monthly Webinars

8/11: 10 Top Training Ideas and Applications - Best of San Antonio 2017 presented by attendees of the SITE conference

9/22: TBD

10/20: TBD

11/17: LinkedIn for Trainers – Greg Johnson from IEA

12/8: Considerations in Becoming a Provider for Adjuster CE – Jordana Robinson from Great American Insurance Group

Monthly Webinars are held from 10:00 a.m. – 11:00 a.m. Central time

ITP Application

September 1, 2017

ITP Application due

For more information on these educational opportunities visit our website:

http://www.insurancetrainers.org/

SITE Socials

August 16, 2017
Uncle Julio's
449 Plaza Real
Boca Raton, FL 33432
6:00/6:30 – 9:00/9:30
Contact: Kevin Milner
kmilner@goldcoastschools.com
Topics: Membership Recruitment and PowerPoint Presentations

September 13, 2017
Eastern Region
Houlihans
Parsippany, NJ
Contact: Evelyn Jorgensen
evelyn.jorgensen@selective.com

September 18, 2017
2017 CPCU Society Annual Meeting
4:00 pm to 5:30 pm at the Laguna Bar - Disney Coronado Springs Resort
RSVP to Connor Harrison
Harrison@theinstitutes.org
by Friday, September 15

September 21, 2017
Western Region
Homewood Suites
Poolside
110 Vantis Dr.
Aliso Viejo, CA 92656
6:30 – 8:30
Contact: Helen Gomez
Helen.gomez@libertymutual.com

September 28,2017
Eastern Region
Los Cabos
Greater Cincinnati Area
Contact: Mary Bruggeman
MBruggeman@GAIG.COM

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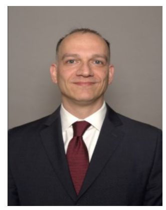

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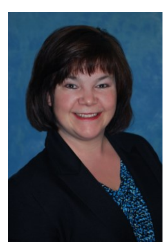

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