

IIAN 2017-18 Strategic Priorities – Progress Update
June 11, 2018

Professional & Workforce Development: Deliver knowledge, data, and networking opportunities to benefit agents and agencies, and perpetuate the independent agency system.

Continuing Strategic Priority: Recruit qualified talent into the independent agency system.
Continuing Strategy: Partner and collaborate with the IIAN Foundation to implement the Talent Network program.

New Talent Task Force

Lori Ruzicka, Chairman
Kelli Backman, Talent Network Director

Budget: \$46,140-IIAN	4/30/18 (6 Mos.): \$ 18,468
\$46,140-Foundation	\$ 22,170
\$92,280	\$ 40,638

Permanent Job Placement:

- 35 candidates qualified for placement
- 6 jobs filled with member agencies

Internships:

- 15 candidates qualified for placement
- 1 internship filled with member agencies

Marketing To Members/Communication:

- 4 Monthly update emails: Qualified candidates currently available; upcoming student events
- 51 member agencies visited in person; focus on large members (top dues categories)
 - Plan to shift ongoing visits to middle-dues category agencies – Summer/Fall
- Building data base of qualified/interested agencies; targeting key agency contacts
- Agency follow-up protocol developed
- Presentations to member groups:
 - 2018 IIAN Winter Conference – Lunch Presentation
 - IIA of Omaha – Lunch Update
 - Cornerstone & ASNOA agency group meetings
 - 2018 May Free CE Seminars – Kearney, Norfolk, Ashland
- **Challenges:**
 - Overcoming agency principals' belief that hiring students without insurance experience/expertise is too risky
 - Selling Talent Network as a credible source of new employees (overcoming entropy of using traditional sources, including for-profit HR firms)

College/Student Interaction:

- **Metro CC** – 2 Mock Interview Days, 12 “Get To Work Wednesday” Events Attended
 - **Met recently with Robert Caldwell, Project Mgr., Workforce Innovation, re New Insurance Producer Program Launching July, 2018**
- **Southeast CC** – 4 Mock Interview Days
- **Hastings College** – 1 Mock Interview Day
- **UNL** – Reverse Career Fair Attended

Start expanding college base – Summer, Fall:

- **Peru State College** – exploratory meeting recently held with Dr. Greg Galardi, Dean, School of Professional Studies; interested in planning students events in Fall
- **Doane Lincoln, Wayne State College** – exploratory meetings to be scheduled

Training & Education:

- New Hire Training program launched
- IIAN education programs re-packaged to include Talent Network component
iian.org/career

Fundraising:

- **New Silent Auction developed - held at 2018 Winter Conference - \$5,675 total raised**
- October, 2018 golf tournament promotion planned
- Talent Network Director expanded knowledge base – attended American Fundraising Professionals national conference; Non-Profit Learning Lab seminar
- **Foundation Fundraising Strategic Planning Day developed/implemented April 27**
 - **Formal Fundraising plan being finalized**