

Independent Insurance Agents of Nebraska Foundation Strategic Plan

Initially developed March - May, 2009 by the Strategic Vision Committee, with the assistance of planning consultant Pat Geary, The FGR Group, Omaha. Approved by Foundation Board July, 2009.

Three-year goals updated July, 2012. Participants: Board Members: Dave Chastain, President; Carol McClelland, Secretary-Treasurer; Jeff Allen; Katie Kochenower; Lisa Laday-Davis; Ed Mark; Sandra Ryks; Jay Sillau. IIAN Professional Development Committee: Mike Glaser, Phyllis Lee, Dee Sykora; Foundation Fundraising Consultant – Liz Kittell

Vision statements and 3-year goals updated May, 2015. Participants: Foundation Directors: Dave Chastain, President; Jay Sillau, Vice President; Carol McClelland, Secretary-Treasurer; Jeff Allen; Staci Deger; Katie Kochenower; Andy Kraus; Lisa Laday-Davis; Bob Marshall; Dee Sykora. IIAN Directors: Mike Jones (V.P.), Sandra Ryks, Phil Winkelmann (Pres.); Foundation Program Director – Liz Kittell; IIAN Marketing Director – Jeremiah Gudding

Responsible groups will develop 3-year Goals/Objectives and Action Steps.

Mission Statement

To **promote the independent insurance profession** to prospective and current insurance industry members through its resources, education, and public awareness.

Vision For the Foundation

To be the premier organization for the **promotion of the independent insurance industry as a profession of choice** for prospective and current agents and other industry professionals.

- Through a **sound financial base** [of endowments], the IIAN Foundation offers [a **broad program of**] **scholarships** for potential new industry professionals.
- The IIAN Foundation promotes and supports **high quality training and opportunities for potential new industry professionals**, to assure a higher standard of professionalism for new independent insurance industry employees.
- The IIAN Foundation promotes a **positive perception of the industry** through public awareness and education.
- The IIAN Foundation **promotes and** supports [and provides] high quality and timely **higher education offerings for existing industry professionals**, to support their success.

Goals – 2015 - 2018

GOAL #1 – Funding (Continuing):

The Foundation’s fundraising program will raise working capital to adequately fund:

- 1. the Education, Scholarship, and Public Awareness objectives through 2018;**
- 2. A full-time Executive Director position by end of 2018 fiscal year; and**
- 3. build undesignated cash reserves based on the 2015 fiscal year ending balance.**

(NOTE: The dollar goal amount for working capital and cash reserves will be adjusted each year based on budgets for objectives related to 3-Year Goals below.)

Assigned To: Fundraising Committee, Program Director, Secretary-Treasurer

3-Year Strategies:

- Determine feasibility of using a fundraising consultant to develop an endowment program and obtaining grants**
- Develop and implement a fundraising program/event independent of IAN programming**
- Continue Jacupke Golf Tournament fundraiser as an independent event**
- Expand support for Academic Leadership program through industry organizations (such as 1752 Club, CPCU Society, industry foundations, etc.)**
- Re-assess allocation of Foundations funds in relation to Education objectives**

GOAL #2 – Education (Continuing):

A program to assist qualified students to gain experience and transition into the insurance industry will be established.

Assigned To: Education Committee

3-Year Objectives:

- Be a sponsoring Partner in the UNL-CBA Center for Sales Excellence**
 - Re-assess allocation of Foundation funds for sponsorship use**
- Develop and implement a consistent annual plan for participating in Center programs and Career Services student inter-face programs**
 - Develop a working group of volunteers**

- Act as a facilitator between student job applications and insurance companies/agencies
- Consistently communicate with company and agency representatives/managers
- Phase out support for the NECC Insurance Services online program

GOAL #3 -- Education:

There will be a long-term plan for allocation of resources for scholarship programs so that they are aligned with the Foundation's Vision and Mission.

Assigned To: Scholarship Committee

- The group identified these potential strategies:
 - Consider phasing out Linder/Jacupke/Omaha high school scholarships and NECC/InVEST scholarships
 - Determine continued viability/funding of Elliott scholarship
 - Re-assess purpose of Lancaster County area high school scholarships

Goals – 2012 - 2015

GOAL #1 – Funding:

The Foundation's fundraising program will raise working capital to adequately fund:

4. the Education, Scholarship, and Public Awareness objectives through 2015;
5. A full-time Executive Director position by end of 2015 fiscal year; and
6. build undesignated cash reserves based on the 2012 fiscal year ending balance.

(NOTE: The dollar goal amount for working capital and cash reserves will be adjusted each year based on budgets for objectives related to 3-Year Goals below.)

Assigned To: Fundraising Committee, Fundraising Consultant, Secretary-Treasurer

GOAL #2 -- Education:

A program to assist qualified students to gain experience and transition into the insurance industry will be established.

Assigned To: Education Committee (see below)

3-Year Key Education Program Goals – 2014-2016

- **Primary Goal:**
 - An “**Insurance Concentration**” program within the UNL College of Business Administration will be developed and working to assist qualified students to gain experience and transition into the insurance industry
- **Secondary Goal:**
 - The potential for establishing new community college programs in the Lincoln/Omaha area will be researched and determined.

Nebraska Project InVEST Programs:

- The Northeast Community College online Insurance Studies program will be growing as a **professional development resource for new employees** in the independent agency system in Nebraska.
- A volunteer network will be established and working to provide insurance and career education resources to **high school students** statewide

GOAL #3 -- Education:

Update criteria for all existing scholarships – particularly the InVEST scholarships – so that they are aligned with the Foundation’s Vision and Mission.

Assigned To: Scholarship Committee

Goals – 2009-2012

GOAL #1 – Funding: Priority ONE. A stronger financial base to utilize to support new efforts is essential.

GOAL #2 -- Education: Create a collaborative relationship between the Foundation and the IAN association’s InVEST Program to ensure effective growth of this and other educational elements of the Foundation’s function.

GOAL #3 -- Education: Expand the current scholarship program to include the monetary value of each scholarship, the number awarded, the eligibility base(s), etc.