

Program Update

October 9, 2019



**INDEPENDENT INSURANCE
AGENTS OF NEBRASKA**

Talent Network

iian.talentnetwork.org

Task Force Meetings

- July, 2019

- Developed Action Steps based on June 20 Joint Board planning session

- August, 2019

- Decided to become UNK Career Center Partner

2018-19 Task Force

- IIAN – Derek Wright, Elliot Bassett, Tony Purvis, Barb Dale, Sandra Ryks
- Foundation – Jon Hongsermeier, Riley Tonkin, Ben Royal, Dee Sykora

Online Survey: Resources Big "I" Could Provide To Help Find/Hire New Employees



Program Success Factors



Board Planning Session – 6/20/19

- **Continuing Long-Term Strategy:** Partner and collaborate (IIAN-Foundation) to recruit qualified talent into the independent agency system.
- **2019 Success Factors:**
 - **Increased awareness** on the part of administrators from targeted Nebraska colleges and leaders of targeted student organizations, of insurance career opportunities and Talent Network resources
 - **Increased IIAN member participation** in targeted college student events
 - **Expanded IIAN web site facilities** for IIAN members, job seekers, and college students to post job opportunities and resumes, and connect with each other
 - **Increased IIAN member use of Big “I” Hires**

Program Success Factors



Board Planning Session – 6/20/19

- **Continuing Long-Term Strategy:** Partner and collaborate (IIAN-Foundation) to recruit qualified talent into the independent agency system.
- **2020 Success Factors:**
 - **10% of member agencies** will post jobs on IIAN interactive web site (if recommended by Task Force) and/or Big “I” Hires
 - Members will **hire 10 candidates from Big “I” sources**, including interns
 - **Increased IIAN member (including nextgen) participation** in student events and planning

Updated Program Objectives:



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Board Planning Session – 6/20/19

- Promote positive perception of insurance industry careers and independent agency system to students and college administrators
- Provide ways for job candidates and members to connect with each other – let them be responsible for the placement process
- Provide resources for member agencies to implement internships themselves

Major Focus - 2019

Promote positive perception of insurance industry careers and independent agency system to students and college administrators.

- This area will be the major focus of staff/member activity.
The goal would be advocacy, not placement (although it could happen organically).
- **Member/Leader Feedback:**
 - Over 50% of members surveyed say this is very important; another 37% say it is somewhat important
 - All of the agents in small group discussions said IIAN should continue this objective

Major Focus - Action Plan - 2019

- Re-connect with college administrator and student organization leaders established by former program director
 - **Prioritize which colleges/organizations to focus on**
 - Task Force chose 3 colleges to work with Fall-Winter 2019: UNK, Wayne State, Southeast CC
 - Student organizations: Phi Beta Lambda, explore Gamma-Iota-Sigma actuary student organization
 - **Schedule in-person meetings over the summer with new Marketing Director/Marketing Assistant**
 - UNK – met with Career Center Director and Internship Director August 15 – discussed how to partner
 - Southeast CC – met with Director of the Career Academy & Business Department August 8 – discussed how to partner on SCC campus, and with 49 high schools across Nebraska
 - Met with Executive Director of Project InVEST at September IIABA Board meeting – she is developing new program targeted to this kind of high school student
- **Develop calendar of student events for Fall, 2019**
- Major program decision: 2-Year Career Center Partnership – UNK (refer to schedule)
 - UNK Events: Oct 1 – Agribusiness/Career Fair Nov 13 – “Company Connections”
 - Wayne State: Oct 23 Career Fair – opportunity to meet with college staff, Phi Beta Lambda connection

Major Focus - Action Plan - 2019

○ Develop calendar of student events for Fall, 2019

○ Major program decision: 2-Year Career Center Partnership – UNK (refer to schedule)

○ UNK Events: Oct 1 – Agribusiness/Career Fair Nov 13 – “Company Connections”

○ Wayne State: Oct 23 Career Fair – opportunity to meet with college staff, Phi Beta Lambda connection

○ Recruit members in areas around targeted colleges to attend events

○ Communicate with Nextgen leaders about how to promote involvement in student events, making presentations

○ UNK Events Oct 1 limited to 4 IIAN reps – Todd Anderson, Johnie Kamery, K.C. McGreer, Zak Morken

○ Still feeling our way – opportunity should expand as student events/involvement expands

○ Create marketing media/materials

○ Print insurance careers brochure updated – used at UNK Agribusiness/Career Fair Oct 1

○ Explore UNK Partnership Promotional Video

Secondary Focus - Action Plan - 2019

- Provide ways for job candidates and members to connect with each other – let them be responsible for the placement process
 - **Determine feasibility/cost of IIAN inter-active website targeting Nebraska college students and IIAN members – job and resume posting**
 - Research solutions being implemented by other state associations
 - A few have state-level program similar to Big “I” Hires – not what we’re looking for
 - New AMS – Growth Zone – has some capability – will need to integrate with current co-branded web site
 - Search for an affordable “plug-in” or replacement for the existing Talent Network Square Space website (www.iiantalentnetwork.org)
 - IIBA Research: Nothing suitable is available
- Promote Big “I” Hires starting now
 - IIAN can subsidize member fees (but not IIBA) – monthly fees not available much longer
 - **Ideal Traits president presenting at Annual Convention, Oct 10, 3:30-4:30 PM – John Hill**

Secondary Focus - Action Plan - 2019

- Promote existing new employee training resources
 - New Hire Training
 - Basic & Beyond (supported by IIABA Virtual University)

Basics And Beyond

*A dynamic and flexible agent training solution from the Big "I" Virtual University.
Online, streaming video - expert classroom instruction, approved for CEUs in Nebraska.*

You've been an agent for a year or two, the ride has been incredible! You like the business, the relationships and the challenge; and you suddenly realize insurance is complicated, confusing and sometimes frustrating. Let this new Big "I" Virtual University training guide you through risk and insurance basics, your way, via the ABEN platform.



The program offers 3 hours to 24 hours of training for a wide range of learning experience - Basic to Beyond!
Courses offered every week - [see Course Catalog and register here.](#)
Or, click on individual courses below. Approved for CEUs in Nebraska.

New Hire Training



New to the industry or have new hires that need training?

Start with the following online training packages.

Online learning is ideal for new hires and job changers and is an excellent way to fit coverage education into the workday. Our new hire training is on-demand, interactive, cost-effective and measurable!

Select a specific curriculum package to train your new hire based on their individual needs and area of expertise. Audiovisual exercises and knowledge checks provide an interactive learning experience giving the new hire a jump-start. Purchase of each package provides 4 month access to the curriculum selected.

Back Burner - 2019

- Provide resources for member agencies to implement internships themselves
- Member/Leader Feedback
 - Not included on survey
 - Small group discussion/experience from prior efforts indicate that some agencies have implemented internships successfully, while the majority of member agencies do not have the internal resources/time
- Recommended Action Plan
 - Promote internship guide already developed by former program director



INTERNSHIP GUIDEBOOK FOR AGENCIES YOU HAVE AN INTERN...NOW WHAT?

Thank you for choosing to host an intern! As you know staffing continues to be a major challenge for independent insurance agencies. Principals regularly point to the difficulty in finding qualified, motivated employees – and to their struggle in drawing those talents to an industry not necessarily known as sexy or exciting. This guide will walk you through the important elements of internships – including issues of compensation, credit, and legal implications – and provide you with a framework for developing your own intern program.

Staffing/Budget Implications

- **Staff for Talent Network through 2019** consists of Carol McClelland, Moriah Dilley (Marketing Assistant), and Kevin Kraft (new IIAN Marketing Director)
 - Not hiring a new full-time program director; shaping the program to fit a lower funding level than originally envisioned, in the short term
- **Budget Impact**
 - Original amount budgeted this fiscal year is **\$97,326 (or \$48,663 each organization)**
 - Positive impact of new staffing plan for 2018-19 fiscal year will be approximately **\$27,715 in savings for IIAN**, and **\$24,7590 reduction in Foundation's budget**.
Projected 2018-19 total program cost: \$44,855 (IIAN-\$21,785 Foundation - \$23,910)
 - On an annualized basis, total program cost for 2019-20 fiscal year could be **\$50,000 - \$25,000 each IIAN and Foundation**

Budget- 50/50 Cost Share – Oct ‘18 – Nov ‘19

		Year 1-YE Proj -10 Mos	Year 2-YE Proj	Year 3 –YE Proj	Year 4-	Year 5		
Program Director		1/1/17-10/31/17	11/1/17-10/31/18	11/1/18-10/31/19				
	Salary/Benefits	\$ 45,948	\$ 64,300	\$ 67,105	\$ 17,050	\$ 77,204	\$	271,607
Marketing	Mileage/Cell Phone	\$ 6,786	\$ 8,558	\$ 9,774	\$ TBD	\$ 9,095		
	Colleges/Students	\$ 8,487	\$ 5,384	\$ 17,125**	\$ TBD	\$ 10,825		
	IIAN Members	\$ 5,350	\$ 3,635	\$ 3,315	\$ TBD	\$ 7,325		
	Sub-Total	\$ 20,713	\$ 17,577	\$ 30,220	\$ 32,950	\$ 27,245	\$	128,705
		Projection 10/1/18 \$ 81,877		**Incl \$5,000- PBL Student Competition				
Grand Total	Budget	\$ 66,671	\$ 92,280	\$ 97,319	\$ 50,000	\$ 104,449	\$	410,719
	Actual	\$ 55,770	\$ 84,708	\$ 44,855			\$	358,366
			50%/50%	50%/50%	50%/50%	50%/50%		
IIAN Share	50%	\$ 28,610	\$ 47,158	\$ 21,785	\$ 25,000	\$ 52,225	\$	174,778
Foundation Share	50%	\$ 27,160	\$ 37,550*	\$ 23,910	\$ 25,000	\$ 52,225	\$	176,903
							\$	351,681
			*10 Mo. Inst. Paid Year 1 & Year 2 Sub-Tot					
IIAN Share			\$ 75,768					
Foundation Share			\$ 64,710					

Budget- 50/50 Cost Share – Oct ‘18 – Mar ‘19

		Year 1-YE Proj -10 Mos	Year 2-YE Proj	Year 3 Initial	Year 4	Year 5		
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Sub-Total		\$ 20,713	\$ 17,577	\$ 30,220	\$ 27,245	\$ 27,245	\$	129,693
		Projection 10/1/18		\$ 81,877	**Incl \$5,000- PBL Student Competition			
Grand Total		\$ 66,671	\$ 92,280	\$ 97,319	\$ 100,744	\$ 104,449	\$	461,469
		\$ 55,770	\$ 84,708				\$	442,996
		50%/50%		50%/50%	50%/50%	50%/50%		
IIAN Share		50% \$ 28,610	\$ 47,158	\$ 48,660	\$ 50,372	\$ 52,225	\$	221,498
Foundation Share		50% \$ 27,160	\$ 37,550*	\$ 48,660	\$ 50,372	\$ 52,225	\$	221,498
							\$	442,996
		*10 Mo. Inst. Paid		Year 1 & Year 2 Sub-Tot				

What's Next – 2019-20?

- What have we learned from UNK experience?
- Re-group after Fall 2019 events – or plan to forge ahead?