

Official Guidelines Local Conferment Ceremony

The Institutes have prepared the following guidelines to assist CPCU Society chapters in planning for local conferment ceremonies. Many chapters that conduct conferment ceremonies are also providing recognition to holders of other Institutes' designations at the same time. Including holders of other Institutes' designations in local conferment activities can:

- provide additional encouragement for them to move on to CPCU
- strengthen ties between the CPCU chapter and other segments of the industry
- provide recognition for your chapter members who are new completers of an Institutes' program

These guidelines, therefore, also include suggestions for recognition of holders of other Institutes' designations as well as CPCU graduates.

1. Conducting the Ceremony

The people authorized to conduct the conferment ceremony are:

- members of the Board of Trustees of The Institutes
- academic and administrative executives of The Institutes
- the Chief Executive Officer and present CPCU Society officers and governors
- other individuals specifically designated by The Institutes

2. Location Arrangements

If a meal is planned in conjunction with the ceremony, we recommend that you:

- Set the head table on a riser that will bring it above the level of the stage or riser being used for the ceremony.
- Set aside special tables for designees and their spouses.
- Provide a small table to hold diplomas.
- Use a microphone if the ceremony is in a large room.
- Provide space where the designees can wait for the others before the administration of the CPCU Professional Commitment.

Other tips

- You will find it helpful to arrange designee seating using alphabetical place cards so that designees can proceed from the table(s) in an orderly fashion. The use of place cards also helps in the last-minute check of attendance before the diploma presentation.
- When a number of new designees will be receiving diplomas consider scheduling a reception or assembly for designees and their spouses at least one-half hour prior to the start of the program. In addition to providing a welcome to new designees, the assembly permits the person in charge to learn the names of any designees who are not there or who have decided to attend at the last minute. An assembly also provides an opportunity to brief designees on the procedure to be followed.
- One person should be responsible for checking designee attendance, amending the list of names, business affiliations, and city/state information to be read during the ceremony, and removing or adding diplomas from the table on stage.

3. *Presentations as part of a Meal Function*

Establishing a time table for the luncheon or dinner and the diploma presentation ceremony will help to ensure a smoothly run program. In order to maximize the audience for the diploma presentation, we recommend that the ceremony be scheduled just prior to the featured speaker.

An illustrative schedule is shown below:

- 11:45 - Assembly of designees, friends, colleagues, relatives, partners and spouses
- 12:15 - Master of ceremonies opens luncheon
- 12:16 - Welcome
- 12:20 - Invocation
- 12:22 - Meal begins
- 1:00 - Introduction of head table (possibly during dessert)
- 1:05 - Recognition of holders of other Institutes' designations (if included)
 - remarks by person conducting recognition
 - recognition of holders of other Institutes' designations in brief ceremonies in diploma presentation area
- 1:10 - CPCU diploma presentation
 - remarks by person officiating
 - presentation of diplomas
 - administration of CPCU Professional Commitment (designees joined in CPCU Professional Commitment by CPCUs in audience)
 - closing remarks (designees return to their seats)
- 1:25 - Principal speaker
- 1:50 - Luncheon concludes

If the speaker is from outside the property/liability insurance industry, we suggest you provide information about the CPCU designation to ensure familiarity with the CPCU Society, the Institutes, and the educational programs. This will guard against detraction from the ceremony, or embarrassment to the speaker that accompanies an unknowing reference to "CPCU" as... "real estate business"... or, "this great business of life insurance of which you all are a part."

4. *Facsimile Diplomas and Designee List*

New CPCU designees receive their official Institutes diplomas in the mail after they have met all exam and program requirements. At local conferment ceremonies, chapter officials present new designees with facsimile diplomas.

The chapter contact for the conferment ceremony will receive a PDF of the CPCU facsimile diploma for their use in printing the number of diplomas needed for the ceremony. Printing the diplomas on buff or ivory paper is strongly suggested. Facsimile diplomas should be rolled and secured with a rubber band. Some chapters may choose, at their own discretion, to also secure with, typically, a maroon ribbon (to be purchased by the chapter).

Someone other than the person who is making the actual presentation of diplomas should read each designee's name and business affiliation, or city of residence, from the podium. Although the designee's names may appear on a printed program, it is preferable to prepare a typed list from which designee's names and business affiliations (and in some cases, city and state) may be read. You will also find it helpful to have a few extra facsimile diplomas rolled and available for unexpected designees.

5. *Diploma Presentation*

Although local practices vary, the following are general guidelines for the diploma presentation ceremony:

- Begin with brief remarks by the person officiating.
- As the names and business affiliations (and city/state) of designees are read, the designees walk from their seats to the stage to receive their diplomas. After receiving the diploma, each designee moves to an area beside or in front of the stage to wait for the administration of the CPCU Professional Commitment to all designees.
- The person officiating makes brief congratulatory remarks, then asks the CPCUs in the audience to stand and join the new designees in the CPCU Professional Commitment.