



Independent Insurance Agents
& Brokers of America, Inc.

EXECUTIVE SUMMARY

THE DIVERSITY TASK FORCE (DTF) is a cooperative industry group comprised of diverse Big "I" agents and brokers and thirteen leading insurance companies—AmTrust North America, Chubb, CNA, Encompass Insurance, Erie Insurance, The Hartford, Liberty Mutual Insurance, Nationwide, MetLife Auto & Home, Progressive Insurance, Safeco Insurance, Selective and Travelers.

MISSION

The Diversity Task Force engages and develops a sustainable diverse independent agency network by partnering with state associations, carriers, and industry affinity groups.

STRATEGIC ACTION PLAN

1. Connect with IIABA State Associations and identify individual states level of engagement, focus areas and needs pertaining to diversity and inclusion.
2. Continue to identify Diverse Independent Agency Owners countrywide to enhance State Associations recruitment and retention efforts.
3. Become a resource center for Agents, State Associations and Carrier Partners to access information relative to increase diverse markets within the independent agency channel and populations served.

KEY ACCOMPLISHMENTS

- The task force has actively worked to become a leading change agent within our industry and is being nationally recognized for the third year in a row as [one of the top 25 US organizations](#) implementing exemplary work in diversity and inclusion initiatives. This recognition has been awarded by the Association of ERGS (Employee Resource Groups) & Councils and will be received alongside Fortune 100 including American Airlines, Coca-Cola and Mass Mutual.
- The task force has continued partnering with InVEST and key affinity groups to promote industry perpetuation resulting in an annual insurance industry diversity career fair targeting college students and recent college graduates. These affinity groups include the Chinese American Insurance Association, National African American Insurance Association, Latin Agents and Brokers Association, Korean American Insurance and Financial Association and IICF's Women in Insurance.
- The task force has actively worked to individually engage state associations in diversity and inclusion efforts. To date 15 state associations are actively incorporating diversity and inclusion into their membership and/or leadership initiatives. In addition, the task force hosted 2 national diversity events which were well attended and received raving reviews from association leaders, agent members and company partners.
- The task force has continued to develop a greater online presence mainly through independentagent.com/diversity in an effort to serve as a leading resource for current and prospective member agents, state association staff and carrier partners. Tools are available for those interested in enhancing their agency value, attracting diverse markets and learning about emerging markets. The page also includes an events calendar noting industry events focused on diversity and inclusion. The task force has also taken a more active approach on social media through the means of Twitter and LinkedIn.



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CURRENT GOALS

- The Diversity Task Force will release an agent development webinar 4 part series focused on helping minority agency owners attract top-rated carriers. The series focuses on teaching agency owners essential best practices beneficial in getting and retaining company appointments. While the series will be available to all of our agent members, the task force will place a heightened focus on marketing it to minority agency owners with the understanding that a large percentage of this group are first generation owners.
- The Diversity Task Force will launch a new Big "I" Newsletter focused on diversity. The newsletter will provide best practices recommendations from task force members and industry experts. It will highlight minority independent agents/agencies across the country. In addition, it will highlight best practice recommendations from state associations as it pertains to their diverse outreach efforts.
- The Diversity Task Force will continue to engage state associations in diversity and inclusion initiatives with plans to launch a diversity "boot camp" for state association leaders. This interactive training session will provide an opportunity for state association leaders to come together and learn diversity and inclusion best practices they can take back to their leadership teams. This will also provide state association leaders an opportunity to further build rapport with task force company partners and member agents.

COMMITTEE CHAIR: Alex Dopazo, *Dopazo and Associates, Inc., Miami, FL*

EXECUTIVE COMMITTEE LIAISON: Randy Lanoix, *Lanoix Insurance Agency, Litcher, LA*

IIABA STAFF LIAISONS: [Whitnee Dillard](#) and [Madelyn Flannagan](#)