



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 sixteen leading insurance companies—Allstate, AmTrust North America, Chubb, Church Mutual, CNA, Encompass Insurance, Erie Insurance, The Hartford, Liberty Mutual Insurance, Nationwide, MetLife, Progressive, Safeco Insurance, Selective, Travelers and Westfield.

### 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 Diversity Task Force has actively worked to become a leading change agent within our industry and has been nationally recognized for three years 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 recently launched a 6-month mentorship pilot project focused on minority independent agency owners as a supplementary component to the Right Start Training Series launched earlier this year. The goal is to further communicate agency best practices with up-and-coming agency owners. Each participating agency owner mentee has been paired with both a seasoned agency owner mentor and company representative mentor.
- 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 continues to develop a greater online presence mainly through [independentagent.com/diversity](http://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.



Independent Insurance Agents  
& Brokers of America, Inc.

## CURRENT GOALS

- The Diversity Task Force will launch version 2 of the Right Start Training Series in the Spring of 2018. The series focuses on helping up-and-coming developing agency owners attract top-rated carriers with a focus on minority owners. The series provides essential best practices beneficial for agency owners looking to get and retain appointments with top carriers. The series will be made available to all independent agents (members and non-members).
- The Diversity Task Force will continue to engage state associations in diversity and inclusion initiatives with plans to launch an annual 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.
- The Diversity Task Force plans to 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.

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

**EXECUTIVE COMMITTEE LIAISON:** Spencer Houldin, *Ericson Insurance Advisors, New York, NY*

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