SURETY FORMS WORKIN GROUP ACTION ITEMS – AS OF 11/19/15

**ACTION: Group to review document listing Affiliate Working Group members showing membership status with IVANS and ACORD located** [**here**](https://www.dropbox.com/s/ffa5bprr2rq6ga2/1-2-NASBP-AFFL-ACORD-IVANS.pdf?dl=0) **and submit edits, if necessary.**

Status:

ACTION: Group should urge their vendors to implement this functionality and work with Dave Golden to demonstrate this functionality to Membership.

Status: Ongoing …

ACTION: Implementations should be discussed, demonstrated and celebrated by the group.

Status: Ongoing …

ACTION: The members of this group have been asked to help promote our efforts using social media. Please follow NASBP on LinkedIn, Facebook, and Twitter and share our progress to spread the word throughout the industry.

Status: Ongoing …

ACTION: Individuals need to write articles to submit (or for NASBP to submit) to various publications.

Status: Robert wrote an article in Construction Executive’s Surety Supplement.

ACTION: Agents need to promote our efforts and work with carriers (particularly those who are not participating with our group) to ensure they understand the importance of our work.

Status: Ongoing …

ACTION: NASBP to create and schedule a webinar with the intention to educate the industry raise interest.

Status:

ACTION: Jenni will submit the revised ACORD 501 with requested changes summarized to Ellen at ACORD prior to October 2, 2015.

Status: 2016

ACTION: Group will review and finalize ACORD 503 in advance of June, 2015 ACORD Vote

Status: 2016

**ACTION: Group will request we modify the ACORD 502 to include the principal FEIN**Status: 2016

ACTION: Begin working on the next form listed above, the Small Contractor Questionnaire.

Status: 2016

ACTION: Group should reach out to all sureties who write “express” / personal credit bond programs looking for the common denominators each carrier needs to have and ask if they’d ALL agree to accept the finalized ACORD form.

Status:

ACTION: NASBP plans to rely on WebEx and conference calls to continue working on forms and integration efforts in 2015/2016.

Status: Ongoing …

ACTION: NASBP, SFAA, and ACORD should discuss using SFAA codes / drop-downs on the forms.

Status: Licensing issues? Remove from list?

**ACTION: NASBP to contact all Surety Forms Working Group members and request they join at least one of the three volunteer groups above to focus their efforts. This roster is to be completed by the end of October, 2015.**

Status: What happened?

**ACTION: A business case needs to be developed as soon as possible.**

Status: 2016

**ACTION: Dave and Greg will search for an existing business case that may already exist from a decade ago in an old ACORD report.**Status: None found. Remove action item, verify with Greg first.

**ACTION: Use Case / Implementation Guide group should begin work to create implementation guide as soon as possible.**

Status: 2016

NASBP MIDYEAR MEETING MINUTES ACTION ITEMS – AS OF 11/19/15

**ACTION: Robert will work with other Committees to recruit volunteers for these sub-groups.**Status: 2016

**ACTION: Dave and Greg will meet with Cal at ACORD 2015 and work with her to determine a timeline and discuss how the group can be more in sync with the ACORD process for form submission.**Status: Progress made at the meeting. Discussed options with Cal

**ACTION: Robert will continue to work with Stuart Binstock to increase involvement from CFMA in the XBRL US surety pilot program.**Status: 2016

**ACTION: NASBP will schedule regular monthly Surety Forms Working Group and Subgroup meetings using WebEx and phone conferences. This schedule will be distributed soon. The next meeting should be prior to Thanksgiving.**

Status: Meeting scheduled prior to Thanksgiving – still need 2016

JOINT AUTOMATION COMMITTEE ACTION ITEMS – AS OF 11/19/15

ACTION: NASBP to create Surety Forms Working Group section on site

Status: In progress, 2016

ACTION: SFAA to provide NASBP with additional edits/content to update for the site

Status: 2016

ACTION: NASBP to research a way to communicate with the entire group (consisting of members, affiliates, non-members, non-affiliates, vendors, industry professionals, etc.) Google Groups?

Status: 2016

ACTION: NASBP to review options for creating different sections for the site and adding a wiki

Status: Wiki – who will maintain, who will add to this? Remove from action items?

**ACTION: Volunteers are needed to participate and focus on reviewing the questions and to join the larger ACORD Survey Group.**

Status: Cal sent information – need more representation from our industry.

**ACTION: This group should begin by reviewing and editing the document found** [**here**](https://www.dropbox.com/s/utzgig7lyznrm4x/4a-2015%20SURETY%20-%20IT%20Survey%20Questions%20DRAFT%20for%20ACORD.pdf?dl=0)**.**

Status: ?

**ACTION: NASBP and SFAA should look into the process of an antitrust statement prior to our meetings.**

Status: 2016

ACTION: NASBP needs to set aside time at the Annual Meeting for another Surety Forms Working Group working meeting (2+ hours) in addition to the Automation and Technology Committee meeting.

Status: Done. Saturday, 1-6pm