



New Jersey Chapter

Annual Meeting and Recognition
Breakfast

June 5, 2019

Agenda



- Networking, introductions, and breakfast
- Awards
- Chapter Annual Business meeting and more networking

- Past Presidents
- Board Members
- New Designees – Class of 2019
- Candidate Members



2019 Board Members



- *Matthew Struck, CPCU* President
- *Hernan L. Medina, CPCU* Immediate Past President
- *Laura Panesso, CPCU* Vice President
- *Lynn Roberts, CPCU* Webmaster & Social Media
- *Willie Jackson, CPCU* Secretary

2019 Board Members



Directors

Sean Brennan, CPCU

Drew Buscema, CPCU

Rick Cerrato, CPCU, New Designee Rep

Ozelia Gray, CPCU

Rich Morales, CPCU, Social Media

Miranda Rodriguez, CPCU

Rita Williams-Bogar, CPCU, Executive Director

State of the Chapter



- Continued to operate within the scope of the mission
- *The New Jersey Chapter of the CPCU Society is dedicated to the professional practice of property and casualty insurance and promotes the highest ethical, educational, and service standards to enhance the stature of the CPCU designation.*

Accomplishments and Initiatives



- Circle of Excellence **Gold** Level
- Maintained Financial Stability
- Continued Member Engagement
- Increased focus on networking
- Successful I-Day w/Central Jersey Chapter
- Educational Event at ISO for Ethics Awareness in March
- 1st Runner-up CPCU Society's Ethics Contest

2019 Initiatives



- Job Board – Seekers as well as Open Positions
- Affinity Discounts
- Marketing & Recruitment – Grass Roots, Social Media, & Collaborations
- Commitment to DOBI & CPCU CE's
- Corporate Champions – Grow the Chapter & Promote the Designation
- Collegiate Collaboration – Cultivate Future Insurance Leaders
 - St. Peter's University
 - VEI – Advisory Board and Business Plan Judging
- Community Involvement
 - Sierra House

Education – I-Day 2018



• *“Emerging Risks, Nanotechnology, and 3-D Printing Insurance Impact”*

■ Gerry Finley

• *“Water Damage: Risk, Diagnosis, and Mitigation”*

■ Larry Hackney, ServPro

■ Robert Todone, ServPro

• *“Diversity and Inclusion Insights”* -

■ Rita Williams-Bogar, CPCU, Past President, NJ Chapter

Education – thru April 2019



- *“Making Ethical Decisions”* -
 - Rita Williams-Bogar, CPCU, Past President, NJ Chapter
at Verisk/ISO, Jersey City
- ARM classes at ICA Risk Management Consultants

Chapter Events – 2018 – June 2019



Bracket Challenge
March 2019



*50th Annual I-Day –
November 2, 2018– The
Palace at Somerset Park*



*Golf Clinic & Networking –
April 25, 2019 – Sunset
Valley Golf Club*

Chapter Annual Meeting 2018



New Jersey CPCU Past Presidents/New Designee Recognition/Annual Meeting 6.6.18



Education and Networking with IDMA July 2018





I-Day 2018





Local Promotions



- Promoting CPCU locally

- Continue community outreach to get the word out
- Encouraged Local Champions to post information on site
- Engaging students at St. Peter's University

- Good Works

- Volunteer activities at Sierra House

Engagement

Communicated
via CPCU
Chaptergram,
LinkedIn,
Facebook,
Instagram, and
Twitter

Sent chapter
leaders to 2018
Annual
Meeting in San
Diego

Sent chapter
leaders to
CPCU
Society's
Leadership
Summit





Annual Meeting 2018
San Diego, CA

Membership



- Membership in the CPCU Society provides you with opportunities to:
- Network with industry leaders.
- Earn continuing education credits, strengthen your professional skills
- Participate in leadership training, and much more.
- It's everything you need to put your career on the fast track.

2018 Membership Survey Results

1. Top types of events members are interested in: Emerging Issues panel, Leadership/Professional/Career Development, License CEs
2. Mornings are preferred, followed by evenings and the occasional lunch time meeting.
3. Thursdays and Fridays work best, followed by Tuesdays, and Wednesdays.
4. Morris, Bergen, Hudson, and Passaic counties were preferred locations.
5. A variety of subjects were offered for consideration
6. Members read the ChapterGram
7. Members volunteered in a variety of focus areas
- 8/9. Sixty percent did not attend I-Day 2018, primarily due to scheduling conflicts.
- 10/11. The majority said to keep the I-day format as is and in the fall with a later start time.



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Leadership Summit



- Recap provided by
 - Matthew Struck, CPCU;
 - Rick Cerrato, CPCU;
 - Rita Williams-Bogar, CPCU
- An inside-out view of how the Society works with insurance professionals in upholding the high standards in the industry.
- An understanding of Society's expectations of a CPCU Chapter, how each position within the chapter fits into the larger picture and how each position is indispensable.

Leadership Summit



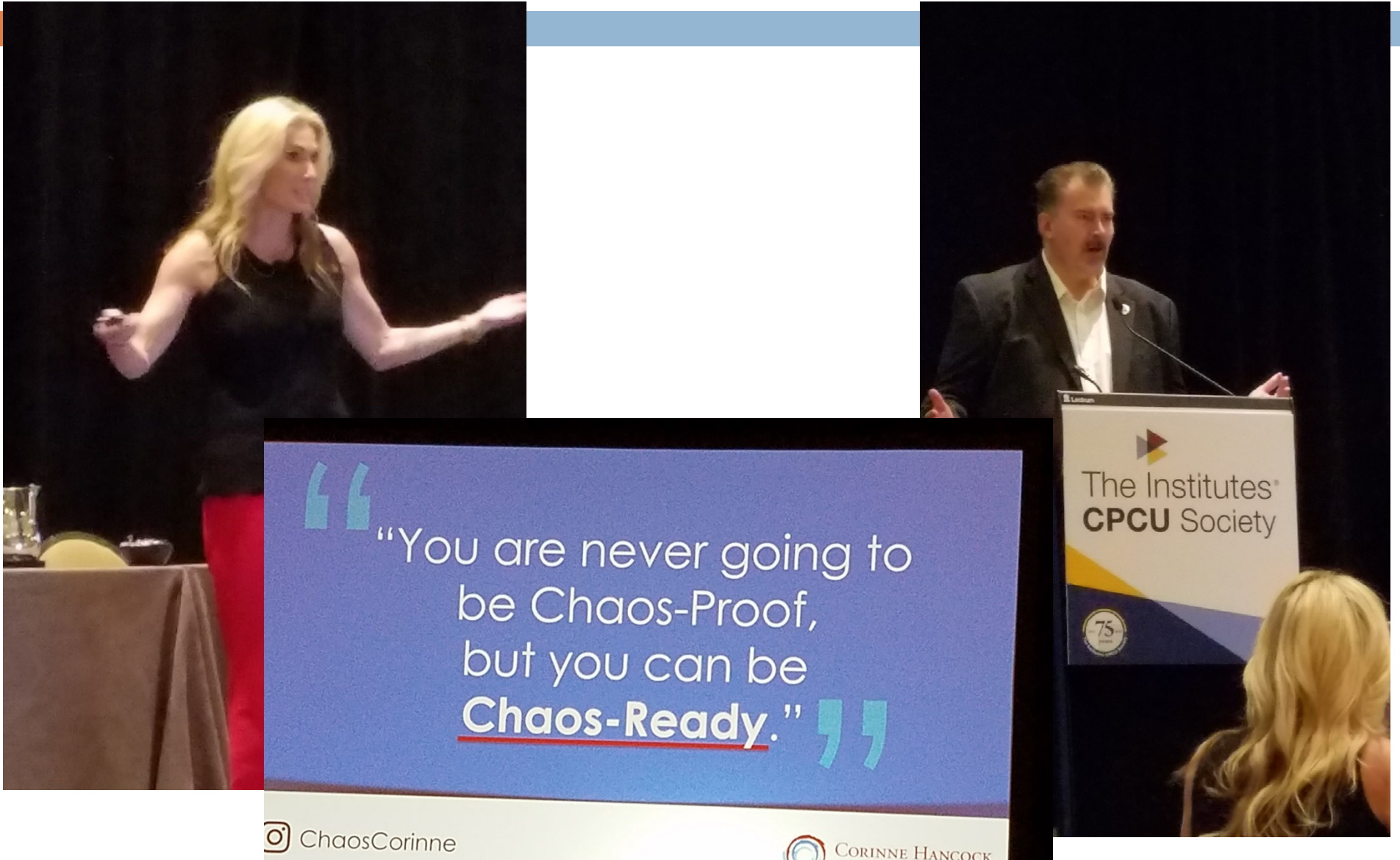
- An understanding of how to work effectively in the chapter - leadership skills such as how to engage and manage volunteers for successful recruitment and retention, how to manage a chapter event, how to offer value to the chapter members coming from diverse environments and uphold the high standards of ethics.
- Priceless networking opportunities -like being at the CPCU Annual Meeting but with a much smaller with an intimate group
- Personal contact with leadership at the Society as well as CPCUs from around the world
- Collaboration with Interest Groups



Leadership
Summit
Denver, CO
April 2019



Leadership Summit Denver 2019



“You are never going to be Chaos-Proof, but you can be Chaos-Ready.”

 ChaosCorinne

 CORINNE HANCOCK

Social Media and Web

- Chapter web site
 - <http://newjersey.cpcusociety.org/>
- LinkedIn Group: CPCU Society New Jersey Chapter
 - <https://www.linkedin.com/groups?gid=3903188>
- Twitter @NewJerseyCPCUs
- Facebook Page
 - <http://www.facebook.com/NewJerseyCPCUSociety>
- Instagram
 - Search for NJCPCU on #Insta to connect

Ratification of 2020 Officers

- President – Laura Panesso, CPCU
- President-Elect – Rick Cerrato, CPCU
- Secretary – Willie F. Jackson, CPCU



Terms of office Jan. 1, 2020 to Dec. 31, 2020

UPDATE: All officers were unanimously elected at the 6.5.19 chapter Annual Meeting.

Upcoming Events

□ What to expect at the Annual Meeting - NOLA



Three NJ Chapter leaders will be presenting Annual Meeting Sessions

Matthew Struck, CPCU
Using Technology to Build a Client Experience 2.0

Rich Morales, CPCU
Ctrl-Alt-Delete: Tackling Tomorrow's Data and Technology Challenges

Rita Williams-Bogar, CPCU
Emotional Intelligence: Turbocharge Your Career

Upcoming Events



Education and
Networking with IDMA,
TBD 2019

*51st Annual I-Day –
October 11, 2019–
The Palace at
Somerset Park*



Upcoming Events



- *January/February 2020* - Kickoff
- *March 2020* – Ethics Awareness
- *April 2020* – Leadership Summit – Portland, Oregon
- *June 2020* – Annual Meeting & Recognition Breakfast

Volunteer Opportunities



- Task focused
- Liaison to other organizations
- Champion within your organization
- Interest Group Liaison
- Social Media Chair

Contact



- Rita Williams-Bogar, CPCU
Executive Director
NJPCUExecDir@comcast.net
201-404-7960