



## **ARIAS·U.S. 2017 Spring Conference**

### **Request for Proposals Submission Guidelines and Application**

Proposal Submission Deadline: 5:00 p.m. ET on January 16, 2017

For questions or comments, contact Joyce Arawole at ARIAS·U.S. at [jarawole@arias-us.org](mailto:jarawole@arias-us.org) or 703.260.7515.

#### **Overview**

ARIAS·U.S. is seeking dynamic, relevant, and interesting content for the 2017 Spring Conference to be held May 3-5, 2017 at the Ritz-Carlton in Naples, Florida. The planning committee is looking for presentations on substantive insurance and reinsurance matters with great interest to companies, law firms, arbitrators and professionals within the insurance/reinsurance industry. The planning committee is also looking to avoid “talking head” presentations for the Spring Conference. We invite submissions that fit within the listed conference themes below that explore specific challenges, topics and issues in-depth and follow the conference formats listed below. Please review the details and guidelines of this RFP process thoroughly before proceeding.

#### **Conference Themes**

- **Emerging Risks** – New or evolving risks that includes technology, social, legal, or economic developments including drones, big data, predictive analytics, cyber, and nanotechnology
- **Business Practices** – Underwriting, claims handling, accounting, and actuarial, in both the property and casualty and life markets
- **Direct Insurance** – Topics to include substantive and arbitration-specific issues arising out of the direct insurance market
- **Reinsurance** – Topics include current trends in reinsurance claims or products, including alternative funding mechanisms such as insurance-linked securities and catastrophe reinsurance bonds and recent case law updates
- **Current Events** You open the NY Times or Wall Street Journal and the following headline appears: “....” The headline you come up with will serve as your session’s title. This conference theme is an opportunity to submit a proposal based on current events in the news that are relevant to insurance and reinsurance industry professionals. The proposal must answer the following questions: What is the topic you are proposing and why? What makes this current event or hot topic of interest to the conference audience? Why is it relevant? How does it impact the business of reinsurance arbitration?

#### **Presentation Formats**

Submissions should be interactive, skill-based and/or audience participative, including moderated roundtable discussions in small groups and other forms of presentation that encourage interaction and lively discussions. The planning committee will limit or eliminate completely, any traditional panel formats from this meeting if possible.

- **Conversations that Matter Roundtable Discussions** (45 – 60 minutes) – Lead a roundtable discussion on a proposed topic. Roundtables are small, informal group discussions that give attendees the opportunity to exchange information, discuss best practices, and network with others around common themes and issues. All roundtable discussions will occur at the same time and attendees will have the opportunity to choose the table topic of their choice in advance. The role of the discussion lead at each table will be to guide the discussion, providing opening comments (about 2 – 3 minutes) on

the topic and invite discussion by posing some relevant questions for the group to discuss. Discussion leads will serve as moderators during the group conversation. Each roundtable will have 8-10 attendees. *Please note that a webinar training will be offered to selected presenters on how to lead a roundtable.*

- **Rapid Fire Case Presentation** (10 presentations in 30 minutes, followed by Q&A) – This fast-paced session is designed to provide an engaging platform for speakers to exchange their ideas around a specific topic and stimulate discussion among attendees. Presenters will be allotted three (3) minutes to present on the following question “***what is the most critical or important reinsurance or insurance case within the last three years?***” For example, *Viking Pump*. The presentation should provide a snapshot of the case using just a few illustrative (not narrative) slides within the allotted time. The planning committee will select up to 10 presenters to do 3- minute presentations, followed by 15 to 30 minutes of moderated questions and discussion. This format is ideal to explore a range of perspectives on an issue, get a broad sense of the state of the industry, or offer several different answers to a question or problem.
- **Interactive Panel Session** (45 - 60 minutes) – A fully-formed panel consists of a moderator and multiple speakers, with a well-developed topic of discussion. When submitting a fully-formed panel for consideration, you should explore the implications of the themes and have no more than four presenters to allow for the audience to engage in a thoughtful and meaningful discussion of the topic. Panelists must consider alternatives to the usual presentation/response format, such as limiting opening remarks and focusing on a moderated panel discussion using thoughtful questions posed by the moderator to the panelists to encourage a lively discussion and debate. Panelists should present an idea to the audience. One example is a point/counterpoint panel discussion on the certified question that the Second Circuit Court of Appeals has sent to the New York Court of Appeals in *Global Reins. Corp. of Am. V. Century Indem. Co. (Bellefonte issue)*. In this interactive panel session, the focus will shift from the presenter to the audience after the first 30 minutes of the session. For the remainder of the session, the moderator becomes a facilitator, inviting responses to comments and questions for the panelists and those around the room. An interactive panel session allows attendees to drive their own learning, listen to multiple perspectives on the same issue, and share experiences with individuals throughout the room. The panel moderator is expected to manage the panel development process, open the panel by framing the discussion, and moderate the discussion among the panel and Q&A portion.

#### Guidelines for Submission

- Proposals may be submitted for targeted member audiences (i.e. Arbitrators/Umpires, Company Representatives, and Counsel).
- Presentations will be considered based on quality of topic, introduction of new and innovative concepts, importance of the subject-matter to insurance/reinsurance arbitration, and appeal to the target audience(s).
- The lead presenter organizes the presentation and is responsible for submitting the proposal application, organizing the group session, moderating the session and leading the discussion.
- This request for proposals is open to all ARIAS·U.S. members and non-members. Interested parties may submit more than one proposal at a time.
- ARIAS·U.S. may request a submission be revised to better fit the conference agenda or combined with another presentation where appropriate.
- Submissions accepted must agree to adhere to a timeline provided by ARIAS·U.S. to submit conference materials, including PowerPoint presentations, and supplementary materials in advance of the conference.
- All individuals accepted to present in any of the presentation types must be registered by the presenter registration deadline. *Please note: no registration or payment is necessary to submit a proposal. Only those accepted will be required to register.*

- Speakers are responsible for their own travel, room, board, incidental, and registration costs.
- Completed proposal application must be submitted electronically by 5:00pm ET on **January 16, 2017** to Joyce Arawole at [jarawole@arias-us.org](mailto:jarawole@arias-us.org).

## ARIAS-U.S. 2017 Spring Conference Submission Application

**SUBMISSION DEADLINE:** 5:00 p.m. ET on January 16, 2017

Email all completed applications to Joyce Arawole at [jarawole@arias-us.org](mailto:jarawole@arias-us.org)

### **Proposal Timeline:**

Proposal Submission Opens:	December 19, 2016
Proposal Submission Closes:	January 16, 2017 by 5:00 p.m. ET
Submission Status Notification:	February 3, 2017
Speaker Confirmation Deadline:	February 8, 2017

Please type your responses and ensure that all fields are complete before submitting the application. All questions concerning this process should be directed to [info@arias-us.org](mailto:info@arias-us.org). **Note:** If your presentation includes a co-speaker or panelists, you must submit "Speaker Information" for ALL of the presenters.

## CONTACT INFORMATION

### **1. CONTACT INFORMATION:**

Please complete the contact information for the main speaker/ submitter of this proposal. This person will be notified regarding the status of the proposal submission.

<b>Full Name:</b>	Charles Timothy (Tim) Morris
<b>Title/Position:</b>	President   CEO Hanover Stone Solutions, LLC
<b>Telephone Number:</b>	843 723 8701
<b>Email Address:</b>	<a href="mailto:tmorris@hanoverstonesolutions.com">tmorris@hanoverstonesolutions.com</a>

## PRESENTATION INFORMATION

### **1. SESSION FORMAT:**

Presentations may be designed for one or more presenters in either a general session or breakout session format.

- Conversations that Matter Roundtable Discussions: 45 - 60 minutes
- Rapid Fire Case Presentation: 10 presentations in 3 minutes
- Interactive Panel Session: 45 – 60 minutes

**A. Please select the presentation format for your proposed session by clicking on the gray box below:**

<input checked="" type="checkbox"/>	Conversations that Matter Roundtable Discussions
<input checked="" type="checkbox"/>	Rapid Fire Case Presentation
<input checked="" type="checkbox"/>	Interactive Panel Session

**I am prepared to be flexible to your needs.**

**B. Will this be planned as a General session or breakout?**

General Session (Large conference audience up to 250): 45 - 60 minutes

Breakout Session (Small group concurrent sessions of up to 70 people in a room): 45 – 60 minutes

<input checked="" type="checkbox"/>	General Session	<input checked="" type="checkbox"/>	Breakout Session
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**I AM PREPARED TO BE FLEXIBLE TO YOUR NEEDS.**

**C. Please provide the technology that you plan on using, if any (PowerPoint, live polling, other?):**

PowerPoint
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**2. CONFERENCE THEMES:**

We encourage proposals focused on a variety of topics that relate to the general themes provided below. Please select a theme by clicking on the gray box below:

<input checked="" type="checkbox"/>	<b>Emerging Risks</b> – New or evolving risks that includes technology, social, legal, or economic developments including drones, big data, predictive analytics, cyber, and nanotechnology
<input type="checkbox"/>	<b>Business Practices</b> – Underwriting, claims handling, accounting, and actuarial, in both the property and casualty and life markets
<input type="checkbox"/>	<b>Direct Insurance</b> – Topics to include substantive and arbitration-specific issues arising out of the direct insurance market
<input type="checkbox"/>	<b>Reinsurance</b> – Topics include current trends in reinsurance claims or products, including alternative funding mechanisms such as insurance-linked securities and catastrophe reinsurance bonds and recent case law updates
<input type="checkbox"/>	<b>Current Events</b> You open the NY Times or Wall Street Journal and the following headline appears: “....” The headline you come up with will serve as your session’s title

**3. TARGET AUDIENCE:**

Proposals may be submitted for targeted member audiences (i.e. Arbitrators/Umpires, Company Representatives, and Counsel).

Please select the target audience(s) by clicking on the gray box below:

<input checked="" type="checkbox"/>	Arbitrators / Umpires
<input checked="" type="checkbox"/>	Company Representatives
<input checked="" type="checkbox"/>	Counsel

My interest is in providing expert witness work, so each of these touchpoints is a good target.

#### 4. SESSION TITLE:

List the presentation title as it will appear in the conference program. Please limit to 10 words or less.

How enterprise risk management can be affected by emerging risks.

#### 5. SESSION DESCRIPTION:

Please provide a brief 25-50 word description of the presentation content. Describe the session in promotional terms for the registration brochure.

ERM is of growing interest to Boards and executive management, as well as rating agencies and regulators. It will become an increasingly contentious issue in all risk related issues, such as emerging risks. Companies without a strategy may find itself with a weakened defense.

#### 6. DETAILED SESSION DESCRIPTION:

Please provide a detailed (no more than 300 words) description of the presentation content and how you plan to engage participants.

A PowerPoint presentation that discusses some principles of ERM and the current status, including regulatory issues, as well as a listing of illustrative and timely emerging risk with descriptions and examples. Participants would be asked to name emerging risks that they have seen or experienced. A panel discussion could be an interesting forum, with ERM being one piece of the emerging risk topic.

#### 7. SESSION LEARNING OBJECTIVES:

Learning objectives are a required component of the submission process so that ARIAS·U.S. can request for continuing legal education credits.

Please state what participants can expect to learn and /or do upon completion of the session in measurable, behavioral terms. **Examples of measurable words include: state, list, describe, explain, identify, name, demonstrate, etc.** [Click here for a link to examples](#)

**Please include three to five learning objectives below:**

1	Understand the principles of emerging risk
2	Identify new emerging risk
3	Relate emerging risk to enterprise risk management
4	
5	

#### SPEAKER INFORMATION

### 8. SPEAKER BIOGRAPHY:

Speaker biographies are a required component of the submission process so that ARIAS·U.S. can request for continuing legal education credits. ***Please complete a speaker biography for each presenter. For additional speakers, please copy this page.***

#### A. Contact Information:

Full Name:	Timothy Morris
Title/Position:	
Telephone Number:	
Email Address:	

#### B. Presentation History:

Have you presented at an ARIAS·U.S. conference or seminar previously?

<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No
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Has this presentation been delivered before?

<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No
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**If yes, when and where?**

A variety of it has been a part of the PCI webinar and a Baker Tilly conference.

#### C. Please describe your familiarity with the target audience and your expertise on this topic:

I have attended only one ARIAS, last November in NYC. My firm specializes in ERM for insurance companies, as well as conducting training programs for state insurance regulators. I have also served as an expert witness on ERM in an insurance lawsuit.

D. Please provide a biography of (up to 150 words) as it will appear in the conference program.

HSS is an ERM advisory firm for insurance carriers and regulators. The genesis of HSS was a recognition that there was an ERM opportunity in the insurance vertical as a result of ORSA.

We help firms: start an ERM strategy, complete ones that need help, or vet existing programs for stakeholders. Our model centers around 25 advisors that average 30 years in insurance experience. Our carrier strategy is to focus on the middle market of \$300 million to \$1 billion, although we are seeing great interest in firms below \$300 million, as well.

Our focus is on the operational and financial value of ERM, not just the regulatory requirement, which plays to our experience.

HSS has also conducted training programs for state regulators and carrier on ERM principles, as well as expert witness work on ERM.

Thank you for completing the Call for Proposals Submission Application. Please email all completed applications to Joyce Arawole at [jarawole@arias-us.org](mailto:jarawole@arias-us.org) by 5:00 p.m. ET on **January 16, 2017**. All submitters will be notified no later than February 3, 2017.