



ARIAS·U.S. 2017 Fall Conference
Request for Proposals Submission Guidelines and Application

Proposal Submission Deadline: **July 10, 5:00 p.m. ET**

For questions or comments, contact Joyce Arawole at ARIAS·U.S. at jarawole@arias-us.org or 703.260.7515.

Overview – Beyond the Traditional Reinsurance Arbitration –“Non-Traditional Disputes”

ARIAS·U.S. is seeking dynamic, relevant, and interesting content for the 2017 Fall Conference to be held November 2- 3 at the Marriott Marquis in New York. The planning committee is looking for presentations beyond the traditional reinsurance arbitration. While many reinsurance disputes involve the collection of long tail asbestos or environmental losses, at this conference, we plan to highlight other "non-traditional" disputes which can be and often are resolved through arbitration. These might include disputes involving a diverse array of products, businesses or lines, including disputes between policyholders and insurers as well as MGA, agency and/or broker disputes, workers compensation and/or life reinsurance disputes, structured finance disputes and other disputes focused on financial matters, disputes involving captives, Bermuda Form arbitrations and others.

ARIAS·U.S. is seeking submissions for 45 to 60 minute interactive presentations in a General or Breakout session format. Submissions should be interactive, skill-based and/or audience participative or other forms of presentation that encourage interaction and lively discussions. Special consideration will be given to proposals that incorporate unique presentation formats. The ARIAS·U.S. planning committee may also provide suggestions for enhancing the panel and overall conference experience for participants. The planning committee is looking to avoid “talking head” presentations for the Fall Conference and invites submissions that fit within the listed conference themes that explore specific challenges, topics and issues in-depth. Please review the details and guidelines of this RFP process thoroughly before proceeding.

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, forming 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.
- Speakers are strongly encouraged to submit an article for the quarterly journal based on their presentation or related to the topic’s focus area.
- 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 5:00 pm ET on **July 10, 2017** to Joyce Arawole at jarawole@arias-us.org.

ARIAS·U.S. 2017 Fall Conference Submission Application

SUBMISSION DEADLINE: July 10, 5:00 p.m. ET

Email all completed applications to Joyce Arawole at jarawole@arias-us.org

Proposal Timeline:

| | |
|---------------------------------|-------------------------------|
| Proposal Submission Opens: | June 19, 2017 |
| Proposal Submission Closes: | July 10, 2017 by 5:00 p.m. ET |
| Submission Status Notification: | July 25, 2017 |
| Speaker Confirmation Deadline: | August 1, 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.

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. **Note:** If your presentation includes a co-speaker or panelists, you must submit "Speaker Information" for ALL of the presenters.

| | |
|--------------------------|--|
| Full Name: | John L. Jacobus |
| Title/Position: | Partner, Steptoe & Johnson, LLP |
| Telephone Number: | (202) 429-6276 |
| Email Address: | jjacobus@steptoe.com |

PRESENTATION INFORMATION

1. SESSION FORMAT:

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

- Interactive Panel Session: 45 – 60 minutes
- Alternative Format: If there is an alternative format that you would like to explore, please explain

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

| | |
|-------------------------------------|--------------------------------------|
| <input checked="" type="checkbox"/> | Interactive Panel Session |
| <input type="checkbox"/> | Alternative Format – Please explain: |

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

- General Session (Large conference audience up to 400): 45 - 60 minutes
- Breakout Session (Small group concurrent sessions of up to 100 people in a room): 45 – 60 minutes

| | | | |
|--------------------------|-----------------|-------------------------------------|------------------|
| <input type="checkbox"/> | General Session | <input checked="" type="checkbox"/> | Breakout Session |
|--------------------------|-----------------|-------------------------------------|------------------|

C. Please provide the technology that you plan on using, if any (PowerPoint, live polling, other?). Please note that audiovisual requests only apply to general sessions:

2. CONFERENCE THEME AND FOCUS

We encourage proposals focused on a variety of topics that relate to the general themes provided below.

The planning committee is looking for presentations beyond the traditional reinsurance arbitration. While many reinsurance disputes involve the collection of long tail asbestos or environmental losses, at this conference, we plan to highlight other "non-traditional" disputes which can be and often are resolved through arbitration. These might include disputes involving a diverse array of products, businesses or lines, including the following below. Please select topic focus by clicking on the gray box below:

| | |
|-------------------------------------|---|
| <input type="checkbox"/> | Disputes between policyholders and insurers, MGA, agency and/or broker disputes |
| <input type="checkbox"/> | Workers compensation and/or life reinsurance disputes |
| <input type="checkbox"/> | Structured finance disputes and other disputes focused on financial matters |
| <input checked="" type="checkbox"/> | Disputes involving captives, Bermuda Form arbitrations and others |
| <input type="checkbox"/> | Other disputes – please describe: |

The conference planning committee is interested in providing fresh and relevant content to keep conference participants engaged. Please answer briefly, the following questions below to help us understand the focus and relevance of your submission to current events and issues within the selected conference topic.

A. What is the specific topic you are proposing and why?

We are proposing an in-depth look at Bermuda Form arbitrations, blending participants from the UK and the US. In addition to Steptoe participants, we have secured the agreement of Ian Hunter, QC, of Essex Court Chambers in London, to join this potential panel. Mr. Hunter has kindly indicated that he will also seek to bring others from the UK, potentially David Scorey, also of Essex Court Chambers, who is the lead author of the treatise, The Bermuda Form: Interpretation and Dispute Resolution of Excess Liability Insurance (Oxford University Press 2011) (NB: Mr. Scorey's participation is to be confirmed).

We are proposing this topic, as we feel that Bermuda Form arbitrations, where New York law governs but UK procedures are used, are not always well understood in the US. By blending New York counsel with UK barrister(s), we hope to bring out not only the basics, but advanced issues that often arise, including a look at current 'hot topics': (a) arbitrator selection (use of New York/US-based arbitrators v. UK arbitrators); (b) perceptions of bias in favor of reinsurers; (c) differences in appellate rights; and (d) cross-border conflicts in the assertion of privilege, etc.

B. What makes this topic of interest to the conference audience?

The ARIAS audience consists of those who participate in Bermuda Form arbitrations in different capacities (company representatives, counsel, arbitrators), and so the topic should be of interest.

C. Why is it relevant? Are there any current events or articles you can share?

Bermuda Form arbitrations remain an integral part of resolving inter-firm liabilities.

D. How does this topic impact the business of reinsurance arbitration?

A review of the ability to conduct Bermuda Form arbitrations efficiently and fairly is directly relevant to, and promotes, ARIAS's goal of working to understand alternative dispute resolution mechanisms in the reinsurance industry.

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 |

4. SESSION TITLE:

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

| |
|---|
| Fly-Over Bermuda In A Legal Jet Plane: Hot Topics In Bermuda Form Arbitrations |
|---|

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.

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|--|
| This session will explore the use of Bermuda Form arbitrations, addressing a wide variety of current topics that are of on-going concern to the resolution of insurance and reinsurance disputes. Since the Bermuda Form was introduced nearly 30 years ago, it has served as a mainstay for resolving significant insurance and reinsurance disputes. These proceedings, which typically blend New York law with UK-based procedures, create unique issues that are of on-going concern. This session will bring participants from the US and the UK to the fore, to explore and discuss how these proceedings operate, and the real and imagined benefits and detriments associated with this form of alternative dispute resolution. |
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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.

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| The content will consist of a basic overview of the Bermuda Form process. We also expect to address the hot issues that arise, including the basic efficacy/fairness of having a UK-based forum apply another country's law |
|--|

(New York), and the hazards created in terms of getting NY-based arbitrators or counsel to work within a UK framework, and vice versa. Although still under consideration, we envision sub-topics to be: (a) arbitrator selection; (b) potential, perceived bias in favor of reinsurers; (c) appellate issues; and (d) cross-border issues affecting the assertion of privilege.

We plan to engage the audience by linking the presentation to a participatory discussion and quiz following the session, wherein a series of prizes will be awarded for the correct answers (Jeopardy, fast-track weigh in type moment). The prizes could be serious (e.g., a copy of The Bermuda Form treatise) or services-based (e.g., a free pass to a dining experience in New York (cost to be contributed to the conference).

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 | List the basic format/elements for conducting a Bermuda Form arbitration. |
| 2 | Describe the legal criteria for selecting arbitrators under a neutral UK regime. |
| 3 | Explain the appellate rights extant following a Bermuda Form arbitration. |
| 4 | Demonstrate a knowledge of current legal and practical issues associated with a Bermuda Form arbitration. |
| 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: | John L. Jacobus |
| Title/Position: | Partner, Steptoe & Johnson, LLP |
| Telephone Number: | (202) -429-6276 |
| Email Address: | jjacobus@steptoe.com |

B. Presentation History:

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

| | |
|---|-----------------------------|
| <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
|---|-----------------------------|

Has this presentation been delivered before at a different conference or event?

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

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

John L. Jacobus, who is admitted in New York, has presented Bermuda form arbitrations in London. He is a long-standing member of ARIAS-US and ARIAS-UK, and is familiar with the target audience. He has practiced law for over 25 years, with a substantial focus on insurance and reinsurance claims.

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

John L. Jacobus, a partner in Steptoe's Washington office, focuses on commercial disputes that are resolved through litigation and arbitration, as well as internal investigations and corporate compliance matters. Mr. Jacobus earned an A.B. in History, *magna cum laude*, *Phi Beta Kappa*, from Harvard University (1986), and a J.D. from the Harvard Law School (1989). He joined Steptoe after clerking for a US Federal District Judge and serving for several years as a Trial Attorney in the Attorney General's Honor Program at the US Department of Justice (DOJ) in Washington, DC. Since he joined Steptoe, a significant part of Mr. Jacobus's work has been with the firm's Insurance and Reinsurance Group. He is a leader within the firm's reinsurance practice, which comprises over 20 lawyers dedicated to counseling, litigation and arbitration.

Speaker Information Continued:

9. 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.***

E. Contact Information:

| | |
|-------------------|---------------------------|
| Full Name: | Ian Hunter, QC |
| Title/Position: | Essex Court Chambers |
| Telephone Number: | +44-(0)20 7813 8000 |
| Email Address: | clerksroom@essexcourt.net |

F. Presentation History:

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

| | |
|---|-----------------------------|
| <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
|---|-----------------------------|

Has this presentation been delivered before at a different conference or event?

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

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

Ian Hunter, a UK barrister and QC, has a broad-based commercial practice that is concerned with arbitration, both as an advocate and an arbitrator. He has decades of experience in the insurance and reinsurance industry, and is a regular participant at ARIAS conferences. He is quite familiar with the target audience.

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

Since taking silk in 1980, Mr. Hunter, who is a member of Essex Court Chambers, has been instructed in many arbitrations, both of a general commercial nature (including ICC and ad hoc arbitrations), and more specialised arbitrations, particularly in the insurance and reinsurance fields. In the last 5 – 10 years he has spent approximately equal amounts of time acting as an advocate in arbitration and as an arbitrator (both ad hoc and ICC). Insurance and reinsurance arbitrations are a particular speciality with an increasing amount of construction work.

10. 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.***

I. Contact Information:

| | |
|-----------------|---------------------------------|
| Full Name: | Sarah D. Gordon |
| Title/Position: | Partner, Steptoe & Johnson, LLP |

| | |
|-------------------|---------------------|
| Telephone Number: | (202) -429-8005 |
| Email Address: | sgordon@steptoe.com |

J. Presentation History:

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

| | |
|---|-----------------------------|
| <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
|---|-----------------------------|

Has this presentation been delivered before at a different conference or event?

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

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

Sarah Gordon, is a long-standing member of ARIAS-US, and a regular attendee at its conferences. She is also a participant in ARIAS-US groups. Her law practice has a heavy focus on insurance and reinsurance claims. She is familiar with the target audience.

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

In the insurance and reinsurance realm, Ms. Gordon represents clients in complex litigation before federal and state courts and arbitration panels. She represents insurance companies involved in a wide range of coverage disputes, including latent health coverage claims, long-tail environmental coverage claims, and claims against directors and officers. Most recently, she has been centrally involved on behalf of insurers in coverage disputes over sports-related brain injury claims (concussions), personal and advertising injury claims, and abuse claims. On the reinsurance side, Sarah has extensive experience representing cedents and reinsurers in the life, health, and property/casualty industries. Her work in the reinsurance area routinely involves the duty of utmost good faith, the interpretation of treaty language, claims management, premium disputes, and underwriting practices. She also has extensive arbitration experience.

Thank you for completing the Call for Proposals Submission Application. Please email all completed applications to Joyce Arawole at jarawole@arias-us.org by 5:00 p.m. ET on **July 10, 2017**.