

Leadership Summit Focused on Revitalizing Chapters

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Almost 350 CPCU Society volunteer leaders from across the United States participated in the 10th Annual CPCU Society Leadership Summit, April 26–28 at the Doral in Miami, Fla.

The 2012 Summit schedule was completely revamped to provide chapter leaders with intensive training on chapter operations and leadership strategies, as well as to provide increased opportunities to interact with Society officers and chapter governors. Chapter leaders were provided with detailed plans for the Society, as the affiliation agreement between the Society and The Institutes continues to be implemented.

To encourage chapter participation, chapter leaders received chapter training and chapter governance and compliance question and answer sessions. Additionally, chapter leaders had the opportunity to learn new leadership skills that will not only

strengthen their chapters, but will also prepare them for greater leadership responsibilities in their workplaces.

Among the highlights:

- A Summit schedule designed so that Society officers and chapter governors could actively participate in training sessions with chapter leaders
- Chapter leader training sessions that targeted chapter operations, finance, membership, and chapter activities
- A vital session on chapter governance and compliance, with legal counsel available to answer questions
- Luncheon speakers who delivered powerful messages on issues such as the impact of generations in the workplace, how to build a talent pipeline, and how to develop talent

Check out the Leadership Summit highlights, listed on the back cover of this issue of CPCU News. ■





Dear CPCU Colleagues:

As many of us may know, business travel has its challenges, along with its perks. One of the most rewarding aspects of my recent travels has been the ability to share the CPCU Society's vision and learn how our Society is providing value to our members.

While in Hawaii meeting with one of my firm's clients, I had an opportunity to sit down with the state's Insurance Commissioner, **Gordon Ito**, who expressed interest in our Campus Initiative and plans to enhance the pipeline of students into the industry. The University of Hawaii is actively working toward a similar goal, and we discussed the possibility of expanding RMI programs to other schools throughout the islands.

During my stay in the Aloha State, I also spent time with my good friend and CPCU lifetime champion **Ken K. Kanehiro, CPCU**. Ken has worked tirelessly, and at his own expense, to make the CPCU experience in Hawaii a positive one and to help advance chapters in Japan and Korea.

Back in Texas, I had the pleasure of providing a CPCU lecture to students at Texas Southern University, along with EWI colleague **Toni Green**. Special thanks go out to the Houston Chapter and Director **Donna M. Wright, CPCU**, who is continuing the work started by former Society president **Marvin Kelly, CPCU**, at TSU. I hope to make this an annual event.

I next traveled to Tulsa to attend the I-Day of the Northeastern Oklahoma Chapter. It was clear from the outstanding presentations by Commissioner of Insurance **John Doak** and Deputy Commissioner **Denise M. Engle, CPCU**, that both are very positive about the Society and are eager to advance insurance education within the state as well as to increase awareness of the CPCU designation and the Society as a whole. Special thanks go to the officers of the NEOK Chapter and to **Scott Brown, CPCU**, who delivered one of the best presentations on ethics I've heard.

A key theme throughout my recent I-Days and chapter visits has been technical insurance issues, a critical area of focus that you identified in our recent member survey. I'm pleased to report that these presentations have been well received.

Wrapping up my travels for the month of April, I was in Miami, Fla. for the CPCU Society's 10th Annual Leadership Summit. A highly productive seminar with almost 350 volunteer leaders in attendance, we outlined the vision, mission, and strategies of the Society going forward. Of vital importance, as discussed in detail at the Summit, is that all CPCU Society chapters understand chapter governance and compliance. During the due diligence portion of the affiliation process with The Institutes, we discovered that many chapters were not correctly incorporated and that some were in danger of losing their tax-exempt status. We are working closely with The Institutes and legal counsel to quickly resolve these issues, but we need your help as well. Chapters are being asked to incorporate in Pennsylvania so that Society staff can monitor changes in state compliance regulations and ensure that chapters file all necessary documents. By being able to monitor any changes in compliance regulation, we will proactively prevent future chapter leaders from having to manage the compliance issues we are currently facing in various states. As we work towards this common goal, more information will be provided.

Looking further ahead, I've met with two senior QBE Insurance Group executives about our upcoming Annual Meeting. They were particularly interested in our Campus Initiative and expressed interest in hosting a reception for our insurance students at the event.

Best regards,

Steve McElhiney, CPCU, MBA, ARe, AIAF
2011–2012 CPCU Society President and Chairman

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Email: membercenter@cpcusociety.org

CPCU Society News

Email: cpcusocietynews@cpcusociety.org

Kevin H. Brown, Esq., CAE, Named Executive Director



Kevin H. Brown

The CPCU Society is happy to welcome **Kevin H. Brown, Esq., CAE**, as our new senior vice president and executive director. Kevin has more than eleven years of association experience, serving most recently as the chief operating officer of the National Apartment Association. He holds a law degree from Quinnipiac University and is a member of Maryland and D.C. bar associations.

Kevin is an innovative and passionate leader, with a successful record of member recruitment and retention. Additionally, Kevin has nineteen years of experience serving the insurance industry in various roles at CIGNA, including as a property and casualty claim supervisor and as senior director of legal and public affairs for the company's field litigation office.

In his new role as senior vice president and executive director, Kevin will work closely with the Leadership Council, chapter governors, and chapter leaders to align CPCU Society initiatives with the CPCU Society's strategic goals. ■

Mickey Brown Jr., Appointed to Leadership Council



Mickey Brown Jr.

CPCU Society President and Chairman **Steve McElhiney, CPCU, MBA, ARe, AIAF**, has appointed **Mickey Brown Jr., CPCU, ARM**, to the CPCU Society Leadership Council. Brown will complete the unexpired term of **David O. Bisbee, CPCU, MBA, ARM, ARP**, who resigned in October 2011. Brown will serve on the Council through Sept. 10, 2012.

Brown is a senior vice president at Marsh USA Inc. in Atlanta, Ga. A graduate of Loyola College in Baltimore, Md., he has more than twenty-five years' experience in international finance, mergers and acquisitions, risk management, and commercial insurance brokerage. Brown is currently serving as the chair of the CPCU Society International Insurance Interest Group Committee. He was editor of the interest group's newsletter, *International Perspectives*, from 2007 to 2010. ■

Join Us for "Reflections of Progress" in D.C.



The 68th CPCU Society Annual Meeting and Seminars, with the theme "Reflections of Progress," is set for Sept. 8-11 at the Washington Marriott Wardman Park.

Attendees can take advantage of:

- Relevant, practical educational programs
- Stimulating leadership experiences
- Thought-provoking discussions of industry trends and news
- Exciting networking and social opportunities
- A wide-ranging expo of relevant insurance products and services



McChrystal

In addition to dynamic general sessions covering international issues, leadership, and agent/broker topics, **Robin Roberts** of ABC's *Good Morning America* will deliver The Institutes' Conferment Ceremony keynote address, where she will inspire attendees to position themselves to succeed. **General Stanley McChrystal**, a four-star general and former commander of United States and international forces in Afghanistan, will deliver a general session keynote address emphasizing management strategy, teamwork, and a forward-thinking outlook.

Plan to attend the 2012 Annual Meeting and Seminars in Washington to reflect on progress—yours and ours. Visit www.cpcusociety.org to register today! ■

Case Study Excerpt: CPCU Student Charles M. Adams, JD, MBA, of Langsam, Stevens, Silver & Hollaender, LLP



Adams

Q: What motivated you to pursue the CPCU designation?

Adams: Pride. The CPCU designation demonstrates hard work and dedication to one's craft... I believe if you start something, you should do it to the best of your ability and try to learn as much about that subject area as possible. The CPCU designation opens doors. For example, if you have two qualified candidates for a position, and one has taken the extra step to obtain CPCU, that is often the tipping point between the two candidates... To me, the CPCU designation is the capstone of insurance knowledge.

Q: How do you foresee the CPCU designation helping you in your career?

Adams: Since my practice group is devoted solely to serving the needs of the insurance industry, it is imperative that I have a real-time, in-depth knowledge of the business of insurance. I know of no better way to achieve that goal than to earn CPCU. Earning the CPCU designation shows insurance and risk management professionals that although I have a JD, my

educational endeavors were not complete until I earned CPCU. I think the CPCU designation will make me a better lawyer and expose me to concepts that I've not been exposed to, even after twenty years in insurance.

Q: When do you plan to complete the CPCU designation?

Adams: My goal is to finish the program by the end of this year—it's one of my New Year's resolutions. The one educational endeavor that means more to me than anything else is earning the CPCU designation. I am reserving a space on my wall to hang my CPCU diploma.

Q: What advice would you give to encourage others to pursue the CPCU designation?

Adams: Dive in and pursue it. It won't be easy, but you will have gratification once it's accomplished. There is no downside; only positive things will come from it. CPCU sets you apart. It distinguishes you from everyone else. It says, 'I've gone that extra mile to be the best I can be.'

To read the complete case study, visit www.TheInstitutes.org/MediaCenter.

CPCU SOCIETY IN THE NEWS

CPCU Society President and Chairman **Steve McElhiney, CPCU, MBA, ARe, AIAF**, was featured in an article titled "New CPCU President Looks Ahead," published in the January 2012 issue of *Rough Notes* magazine. McElhiney discussed a number of issues, including social media. "It's the future and how we will connect with our younger generation. Social media will play a part in the creation of virtual chapters for bringing together members in remote areas," McElhiney said.

Society President-Elect **David S. Medvidofsky, CPCU, CIC, ARM, AIAF, AAI**, was quoted in an article on "Three reasons to consider VIN etching for your car," posted in *InsuranceQuotes.com* in late 2011. "When it comes to added theft deterrents, it's going to be alarm systems and VIN etching that'll effectively do the most to reduce your auto premium," Medvidofsky said.

The 2011 CPCU Society Annual Meeting and Seminars was ranked in *Best's Review* magazine's "2011 Insurance Events" as the fourth best-attended insurance event. The ranking, based on the number of attendees, appeared in the magazine's December 2011 issue.

Karl Ieuter, vice president of Ieuter Insurance Group, was featured in the nGI section of the April 2012 issue of *American Agent & Broker*. He is past president of the Northeastern Michigan CPCU Society Chapter and is a member of Professional Insurance Agents of Michigan and Young Insurance Professionals of Michigan. ■

Champion Employers: State National & Erie

Who knows better than CPCU Society chapter members when it comes to which employers are truly champion supporters of the CPCU designation and Society membership? This year, "Making the Connection" will highlight those organizations that Society chapters have identified as outstanding supporters, starting with State National Companies (SNC) and Erie Insurance.

State National Companies

State National's lender services division provides collateral protection and other insurance products and services to financial institutions, while its program services division provides access to insurance affiliates, which act as policy issuing carriers for producers. Licensed in fifty states and Washington, D.C., SNC continues to experience record-breaking growth, which it attributes to its unrelenting commitment to its customers.



Pearson

According to **John M. Pearson**, executive vice president, all of that success is attributable to SNC's people: "We empower quality people and give them the authority to do the right thing."

The CPCU designation is an important component to that strategy because the designation helps ensure we have a strong contributor in place to meet the various customer service challenges. State National is proud of our employees' involvement with the CPCU Society, and we encourage and support their commitment to CPCU excellence.

"Our underwriting effort is as much an art as it is a science. We approach our pricing from a critical balance perspective. We price going in to gain the business, but we never lose sight that it must remain profitable long term. Our insurance has many variables or 'moving parts' that impact the financial performance. In addition, each of our customers' needs is different. We find the broad technical

knowledge of the CPCU program provides an advanced foundation enabling those employees to better understand the intricacies of our program and structure the optimal risk mitigation platform given each unique customer's needs. There is no rule book or steps to follow.

"SNC enthusiastically supports the CPCU Society both financially and through our participation in the Fort Worth Chapter. We value the Society's contribution to making our industry better."

Erie Insurance

According to the Presque Isle Chapter, the relationship between Erie and the CPCU Society continues to strengthen under the leadership of **Thomas Hagan**, Erie's chairman of the board, and **Terrence Cavanaugh**, president and CEO.

Erie's founder, **H.O. Hirt**, a former schoolteacher, was an advocate of employee education. In a 1968 letter to the Pennsylvania Insurance Commissioner, he wrote, "Knowledge is power—and we want everyone in our organization to have all the power that education can give them." Erie continues to live up to and exceed this expectation.

Erie reduces the barriers to obtaining the CPCU by providing study materials at no cost to employees, holding classes during lunch and after work hours, compensating for time off for exams, reimbursing exam fees upon successful completion of a course, and offering incentives for passing each course, along with an additional bonus for completing the CPCU. In fact, Erie was the first employer to have a certified Institutes' on-site testing center.

Erie's support does not stop once an employee obtains his or her designation. Cavanaugh hosts a dinner for new CPCU designees. The company pays Society and chapter membership dues for both CPCUs and for employees who have passed four or more CPCU exams ("candidates"). Erie will also cover the

costs associated with new designees attending the CPCU Society Annual Meeting and Seminars, The Institutes' Conferment Ceremony, local chapter meetings and professional development programs, as well as attendance at Society conferences while holding chapter or Society leadership positions.

Erie has supported the Presque Isle Chapter throughout its nearly 25-year history. In 2010, when the chapter established a scholarship fund, Erie generously offered to match chapter members' contributions, showing that Erie is not only dedicated to educating the current workforce, but also to encouraging a future generation of insurance professionals.

The CPCU Society commends Erie Insurance, State National, and all of our member employers for their dedication to continuous learning and the pursuit of the CPCU designation. ■

Making Ethical Decisions Under Pressure

Ever heard of Notker the Stammerer? Despite the unenviable moniker, this ninth century historian could tell a pretty good tale (only in written form, though, I suppose). Here's one that I find among his most intriguing:

An envoy of the Frankish King Charlemagne was being entertained by a Greek emperor with a lavish feast. Being less than fully versed in the etiquette of the Byzantine court, he unwittingly broke an obscure law concerning eating seafood in the royal presence. The monarch quickly handed down the sentence—death! Upon request, the envoy was granted a final wish. He then asked, “Let everyone who saw me turn over that fish be deprived of his eyes.” All in attendance suddenly swore by God, angels, and saints that they were “beyond reach of the situation.” Meaning that, suddenly, no one had seen a thing. Since there were no longer any witnesses against him, the envoy was sent back to Charlemagne unharmed.

Although admittedly some of the particular dangers in this story have little practical application today, the envoy was fully aware of an important principle that is as true now as it was more than 1,000 years ago. The more stressful and difficult the situation, the more likely a person will lie or otherwise act unethically.

And this includes all of us! While scoring a psychological test in school, I became intrigued with a particular measurement known as the “Lie Scale.” In essence, this scale was designed to catch people who—deliberately or not—were not accurately self-reporting on the test. Questions included: (1) I get angry sometimes, (2) I do not always tell the truth, (3) Once in a while I think of things too bad to talk about, and (4) At times I feel like swearing.

Not too incredibly perhaps, psychologists have determined that sometimes people get angry, are not always completely honest, have socially unacceptable thoughts, and feel like swearing (or maybe even actually swear?). Although the scale is principally meant to help confirm the accuracy of the test results, it can also be an indicator of mental health in its own right. Those who are aware of and acknowledge their own potential shortcomings are usually more able to prepare for difficult situations and make better decisions. It's simply self-deceptive to think that you're beyond temptation.

In his intriguing book entitled *Why Everyone (Else) Is a Hypocrite*, psychology professor **Robert Kurzban** argues that prolonged periods of effort at difficult tasks can actually give more impulsive centers of the brain more influence. In effect, mental fatigue can erode willpower. In order to bolster your resolve and improve your judgment, you might try some exercise, a good night's rest, taking a long break (or even a vacation day), or otherwise doing something enjoyable. It



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seems that deliberately giving the more impetuous centers of your brain rest or some constructive stimulation can help limit impulsivity in general—and by extension, help you make decisions that you won't tend to regret later. ■

Editor's note: The opinions expressed in this column are those of the author and do not necessarily reflect the views of the CPCU Society membership, the CPCU Society Ethics Committee, or the author's employer. If you have suggestions for upcoming articles or comments about the “Question of Ethics” column, please contact William F. Traester, CPCU, at wtraester@archinsurance.com.

Ethical Behavior Is More Than Just the Golden Rule

Ethical behavior is crucial to preserving not only the trust on which insurance transactions are based, but also the public's trust in our industry as a whole. While March was Ethics Awareness Month, it is always a great time to focus on ethical behavior in the workplace. Given the increased public scrutiny of ethical conduct both inside and outside the insurance industry, an organization that is known for its high ethical standards will enjoy a better reputation among consumers.

Ethical behavior is based on morals, laws, and ethics. Morals entail making the distinction between right and wrong, laws are legal tenets, and ethics involves knowing what to do when a law is not applicable or when a situation presents more than one "right" answer.

To resolve ethical dilemmas, insurance professionals may use decision-making tools that are rules based, situation based, people based, or any combination thereof. No one approach will work all the time, and combining approaches often results in a more creative resolution.

When using rules-based decision making, the insurance professional must consider whether any laws, regulations or standards apply in a given situation. He or she must follow an applicable rule if it prescribes mandatory conduct. However, in many situations, the application of rules is not



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mandatory. Situation-based decision making involves analyzing the potential outcomes of possible decisions in particular circumstances. It requires an assessment of the consequences of a decision and asks one to place the greater good above individual need. People-based decision making is founded on the principle of the Golden Rule: "Do unto others as you would have them do unto you." This principle requires the decision maker to consider the personal circumstances surrounding a decision and calls for a degree of empathy.

All insurance professionals should strive to do what is right and honorable in their public and private conduct. Ethical guidelines establish and promote a profession-wide foundation, understanding and code of conduct for making better ethical decisions. Thank you, as CPCUs, for leading by example. ■

FROM THE INSTITUTES

CPCUs Value Technical Insurance Education

As you know, we surveyed CPCU Society stakeholders in December 2011; you can find more detail about the survey results on page 10. The key finding, which came as no surprise to me, was the high value respondents placed on technical insurance education as a member benefit. Wherever I travel, I never cease to be impressed by the high degree of professionalism that I see in CPCUs. I attribute this professionalism to their deep-rooted belief in and support for professional development.

CPCU Society chapters across the country and around the world offer CPCU classes (nearly 300 in 2011 alone). Moreover, individual CPCUs serve as formal and informal mentors in their workplaces, and all of you lead by the example you set. There is no doubt in my mind that you "aspire to raise the professional and ethical standards of the insurance and risk management profession," as encouraged in Canon 5 of the CPCU Code of Professional Conduct.

In the process of giving so generously of your time and talent to others, remember to continue to broaden your base of knowledge. Professional development is not a destination; it is a journey. And earning the CPCU designation is just one milestone along the way.



Peter L. Miller, CPCU, is president and chief executive officer for The Institutes.

Seek out educational opportunities wherever you can find them. To this end, The Institutes are offering an exclusive 25 percent discount to all paid members of the CPCU Society. You may apply this discount to the purchase of study materials, including:

- Textbooks
- Course Guides
- SMART Study Aids
- Online Learning Courses

To obtain this exclusive CPCU-members-only discount (for individual purchases), use the code CPCU25 when placing an order by phone with The Institutes' Customer Service Department (800) 644-2101 or online at www.TheInstitutes.org. ■

Outreach Initiatives Support CPCU Students

The CPCU program experienced significant growth in 2011, including:

- 1,852 new CPCUs were conferred—the largest class since 2007.
- More than 5,520 new students started the program.
- As of January 1, 2012, more than 500 students are already eligible to attend the 2012 Conferment.

Studies have shown that early and consistent chapter outreach is a strong key to success in the CPCU program. It also affects membership in the CPCU Society. CPCU students who have contact with their local chapter are more likely to complete the CPCU program and subsequently join the Society. Those who are welcomed and supported early in their CPCU career reap the benefits, and so does their chapter.

Students are considered members of the CPCU community as soon as they begin the program. Accordingly, The Institutes and the Society have stepped up efforts to support chapter outreach to CPCU candidates. In a special mailing in January, all Society chapter presidents and candidate development chairs were sent a packet of resources to help them prepare effective student outreach programs in their communities.

The packet included a cover letter containing a step-by-step approach for contacting students and a spreadsheet with student names and contact information. The list was sorted by number of examinations passed, so proper communications could be directed to each student segment. Three template letters were included with messages appropriate for students in

three stages of the CPCU program: beginner (one or two exams passed), intermediate (three to five exams passed), and nearly finished (six or seven exams passed). Chapters were encouraged to add chapter details to these letters.

Additional contact strategies were suggested: contacting each student by phone to offer support and let the student know about chapter activities, inviting each student to at least one chapter event at no charge, adding students to chapter mail and e-mail contact lists, setting up a “Candidates’ Night” or another special event, enlisting the chapter Champions for outreach to students in the office setting, offering students a buddy or mentor, and encouraging candidate membership.

Candidate membership is available to CPCU students with at least four examinations passed. A special reduced membership rate of 50 percent dues is available for candidate members. All chapters are encouraged to increase their candidate membership this year. All members are asked to reach out to colleagues working toward their CPCU designation.

Chapter Governor **Gabriela F. Dominguez, CPCU**, reports: “This information and the resources included will greatly help my chapters be more proactive in reaching out to CPCU students and giving them important support. The South Florida Chapter used this list to plan the next series of CPCU courses.” ■

INTEREST GROUP NEWS

CPCU Society Reinsurance Interest Group Delivers the Goods!

On March 15, 2012, the CPCU Society Reinsurance Interest Group delivered its annual symposium in Philadelphia to more than seventy attendees at the historic Union League of Philadelphia. For a full day, top reinsurance professionals delivered riveting educational sessions to support the theme of the symposium: “An Industry in Transition: Is 2012 the End of the World as We Know It?” Attendees heard speakers address far-reaching topics including hurricane forecast frequency trends, an update on Bermuda insurers and reinsurers, new perspectives on CAT modeling, the financial stability of the industry, and emerging issues such as hydrofracking.

During the luncheon session, CPCU Society President **Steve McElhiney, CPCU, MBA, ARe, AIAF**, delivered the keynote presentation on emerging issues in the industry, and the latest Associate in Reinsurance (ARe) class was recognized for its achievement.

A major educational program cannot take place without stellar leadership, and this year the CPCU Society Reinsurance Interest Group was led by industry veterans **Timothy D. Foy, CPCU, ARe**, and **Charles “Chuck” W. Haaake, CPCU**, who coordinated the delivery of six outstanding sessions and presentations by eleven leading industry executives. ■

Houston Chapter Thanks Current and Past Society Presidents

A word of special recognition to CPCU Society President **Steve McElhiney, CPCU, MBA, ARe, AIAF**, for teaching a section of CPCU 500: Foundations of Risk Management and Insurance to a group of finance students at Texas Southern University (TSU).

Past Society President **Marvin Kelly, CPCU**, was the original driving force behind a risk management program at TSU. His goal was to expose college students to the wide array of career opportunities in the insurance industry and to stress the need for their active engagement. The Houston Chapter took on the challenge and continues to build on that foundation.

Joining McElhiney in his commitment to CPCU attainment at TSU were:

- **David Barnes, CPCU**, senior vice president, Alliant Insurance Services
- **Kathryn Fastner, CPCU**, auditor-senior internal, Argo Group US
- **Toni Green**, vice president, claims, Contran Corp/EWI Re, Inc.

- **Kimberly Hill, CPCU**, underwriter, Liberty International Underwriters
- **Colleen Holcomb, CPCU**, senior account manager, USI Southwest
- **Gavin Hurd, CPCU**, managing director, J. Wortham, LLC
- **Gerald Ladner**, regional president, State Auto
- **Greg Rose, CPCU**, regional financial officer, State Auto
- **Gary W. Sylvester, CPCU**, senior risk analyst, Anadarko Petroleum Corp.
- **Betty Waddell, CPCU**, senior placement broker, Willis of Texas, Inc.
- **Steven P. Weiss, CPCU**, vice president, Liberty International Underwriters
- **Donna Wright, CPCU**, assistant vice president, Germania Insurance

"We are impressed with the quality and engagement level of Texas Southern students in our classes," Holcomb said, noting that TSU classes also provide a fertile hiring ground, as they allow

Continued on page 11

Continuing Education From CEU.com: Society Members Enjoy a 35% Discount

New Compliance Assistant Launched

CEU.com's new Compliance Assistant helps professionals better understand their continuing education (CE) requirements and match course selections to those requirements.

The Compliance Assistant will be released in two phases. Phase I, available now, lets participants select their licensing state(s), and then provides a list of courses based on state requirements and CEU.com's approved course list so a participant can then register for courses.

New Retail Pricing

The Unlimited Access Program from CEU.com is now only \$99 per year

and includes access to all CEU.com courses, unlimited credit reporting for one state, and reporting for additional states or designations for \$3 per course. Additionally, the new retail pricing also provides:

- One-to-five credit courses costing between \$19 to \$39.
- Additional states or designations credit reporting for only \$3 per course.
- An ethics course for \$4.95
- Don't forget: CPCU Society members enjoy a 35 percent discount on all CEU.com courses.

To learn more about the new Compliance Assistant and new CEU.com pricing, visit www.ceu.com. ■



Survey Results: Engaging CPCU Society Stakeholders

In December 2011, the CPCU Society and The Institutes conducted research to engage CPCU Society stakeholders (including members, nonmembers, chapter and interest group leaders, and employers) and discover what each group values in CPCU Society membership. These surveys uncovered three common themes, which the CPCU Society, volunteer leadership, board members, and The Institutes will use to guide strategic initiatives.

Providing Technical Insurance Education

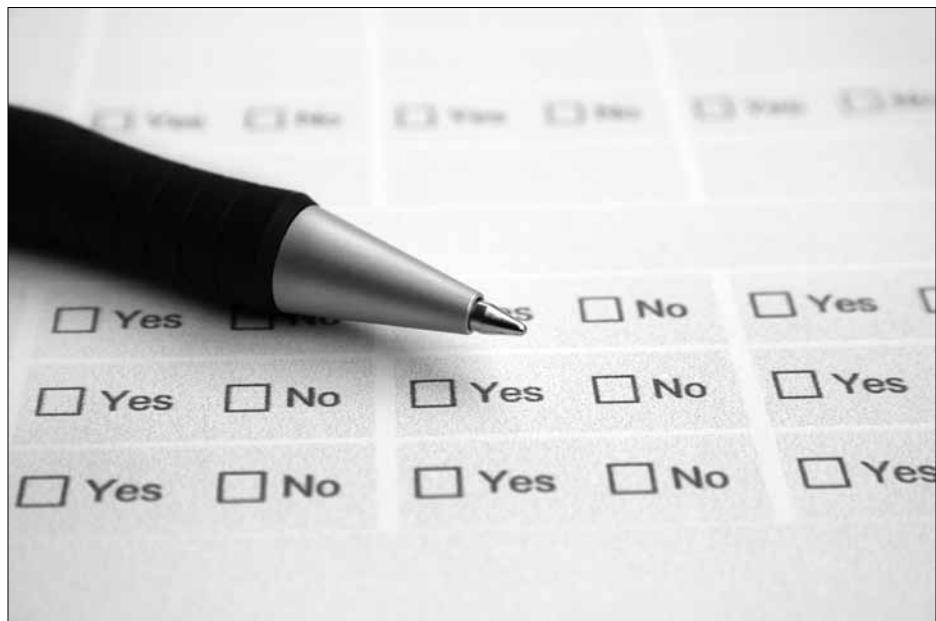
Overwhelmingly, respondents indicated that the CPCU Society should focus on being a professional development resource for technical knowledge on current insurance industry issues. Some of the themes that emerged:

- Including education and professional development as part of membership
- Desire for education both Society-wide and at the local chapter level
- Need to stay current on important business issues
- Belief that employers would increasingly support membership if CE credits were provided
- Interest in educational opportunities that offer CE credit
- Desire for a variety of CE content and delivery methods

Promoting the Professional Qualifications of CPCUs

Employers clearly view and value CPCUs as subject matter experts, instructors, advocates, and mentors. Moreover, CPCUs are seen as valuable resources for their industry and community. Some of the themes that emerged:

- The need to increase employer awareness of the Society and its contributions
- The need to promote to consumers the value of working with a CPCU



- Value in having CPCUs as employees as subject matter experts and "go-to" people
- Willingness to mentor colleagues and CPCU students

Increasing Industry Awareness and Attraction

Finally, respondents see the need to increase the visibility of the CPCU Society among individuals, their company and industry, and consumers. Some of the themes that emerged:

- The need to attract talent into the industry
- Vitally important, as our industry is faced with a dramatic talent shift

CPCU Society volunteer leadership will use these data to help drive the strategic direction for the CPCU Society. We look forward to sharing developments with you as we move forward. ■

From Class Spokesperson to Director of Candidate Development

Leona D. Hay: A CPCU Success Story

Congratulations to **Leona D. Hay, CPCU, AINS**, for being nominated as the director of candidate development for the Connecticut CPCU Society Chapter. In addition to her new role with the Society, she has received requests for numerous speaking engagements to promote the CPCU designation.

Leona is an analyst—retro services for The Hartford and was one of the class spokespeople for the 2011 CPCU Conferment Ceremony in Las Vegas. Since earning the designation in June 2011, she has been asked to share the value of the CPCU designation with various audiences, including these:

- The Hartford's Chief Underwriting Officer Recognition Luncheon. At this meeting with **Gary Thompson**, chief underwriting officer of The Hartford, she spoke with senior leadership on the value of promoting insurance education among The Hartford's colleagues.
- Capitol Community College. **Bill O'Connor, CPCU**, longtime CPCU instructor and mentor, asked Leona to speak with his students at Capitol Community College. He asked her to share a new designee's perspective on the value of the CPCU designation.
- The Hartford's National Accounts Quarterly Billing Awards Ceremony. Leona was asked to give a presentation on the value of The Institutes' designations. Following the presentation, several of her colleagues asked to learn more about the programs and registered for an Institutes course.
- Independent Insurance Agents of San Antonio (IIASA) Professional Development Luncheon. Leona earned a standing ovation for her keynote address, in which she shared her CPCU journey and the value of earning the CPCU designation.
- Alamo CPCU Society Chapter. The Alamo Chapter held a gathering for Leona and made her an honorary chapter member.



Leona D. Hay, CPCU, with The Institutes President and Chief Executive Officer Peter L. Miller, CPCU, at the Special Guest Reception before the 2011 CPCU Conferment Ceremony, during which Hay was a class spokesperson.

- Connections Visit to Burns, Brooks and McNeil Agency. This agency asked Leona to share her CPCU journey, focusing on the value it brought to her career.

In addition to arranging Leona's speaking engagements, The Hartford presented Leona with a Certificate of Excellence in recognition of her commitment to The Hartford National Accounts for the fourth quarter of 2011. The award was also given, in part, for her completion of the CPCU designation.

In Leona's words, "Doors truly do open with the CPCU designation. I am living proof!"

Congratulations, Leona! Keep spreading the word! ■

Houston Chapter Thanks Current and Past Society Presidents

Continued from page 9

companies to get an up-close and personal view of potential candidates.

"A career-seeking applicant who can come to an insurer with both a college degree and CPCU classes under his or her belt is a much more value-adding employee and

has a leg up on a promising career path," Kelly added.

The Houston Chapter encourages other Society members to get involved by delivering course instruction and providing employment and internship opportunities

for students. For more information, contact **Donna Wright, CPCU**, at dwright@germaniainsurance.com. ■

Personal Stories of Earning CPCU

Don't Give Up, No Matter How Long It Takes

I started my journey in 1974, when I took the INS series. Then in June 1982, I started the CPCU program by passing CPCU 6. I decided to jump to the AU series in December 1982 and completed it in May 1984.

I started CPCU studies again in 1985 and passed CPCU 3, 4, 1, 7, and 10 (in that order) by 1996. In January 1997, I took my first CPCU 8 (now known as 540) but did not pass. I was devastated, as this was my first nonpassing grade. I attempted it again in January 1998 and September 1998 and again received nonpassing grades. So, I decided that accounting/finance was not for me. When it was changed to computer/multiple choice, I tried again in June and August 2006 and did not pass—AGAIN.

When they changed the format of 540 again to make it more insurance-related, I was talked into it again. I received great help

from some fellow employees at the Motorists Insurance Group and finally passed in May 2007. What a marvelous trip to Hawaii!

My spouse, children, and family fully supported me throughout the whole time. They celebrated each passing grade and cheered me on when I couldn't master the accounting.

It was a long haul, but I wanted to do it for myself. I did, and I am proud to hold the CPCU designation. The moral of my story? Don't give up, no matter how long it takes.

After more than forty years at Motorists (mostly working as an underwriting technician for the MICO Insurance Company), I retired at the end of March.

Jane Finchum, CPCU, AU, AINS

A Positive Impact on My Career

I was motivated to earn my CPCU designation because it represented a unique challenge to become highly educated in the insurance profession.

I obtained my AIC designation in 1995 and took my first CPCU course immediately afterward. It takes a great deal of hard work and sacrifice to earn the CPCU designation. I spent many nights and weekends preparing for the tests and attended several review sessions. I can still remember writing for three hours straight during the tests and still feel the discomfort in my fingers!

I have mentored many CPCU candidates over the years and encourage all insurance professionals to earn the CPCU designation and participate in the CPCU Society.

Since becoming a CPCU in 2000, I have met many terrific insurance professionals. I truly feel the CPCU designation has had a positive impact on my career.

**James D. Kummerer, CPCU, AIC
EMC Insurance Companies**

Immense Respect

The CPCU designation is well respected nationwide. Since completing my designation in 2007, it has widened my horizons in the insurance world not just from what I learned while preparing for the exams, but also from other CPCUs I have come across, from all walks of life.

CPCU has opened many doors for me and continues to do so. I am very happy to have achieved my designation, and I have immense respect for the CPCU designation.

**Nona Sodhi Mahajan, CPCU, CRIS,
Senior Underwriter
Markel Mid-South Region Binding/Brokerage P&C**

I've always enjoyed the monthly CPCU Society meetings (first in Richmond, Va., and now in Dallas). They keep you updated on the goings-on in the insurance world.



Alpert



Bieniek



Bishop



Hughes



Iglesias



Linkous

Comings and Goings

Joseph Bieniek, CPCU, AIE, CRM, has joined First Consulting & Administration, Inc., as vice president and senior consultant. He will be responsible for assisting the insurance industry with its business strategies focused on compliance and regulatory needs. Bieniek serves as a board member of the Society's Kansas City Chapter and as co-chair of the Regulatory and Legislative Interest Group Committee. He holds the CPCU, AIE, CRM, CCP, CIC, ARC, MCM, AIS, AU, and AINS designations.

Marcia Spieker, CPCU, AU, joined Union Agency as senior account manager. Spieker has more than thirty years of experience in the insurance industry and is responsible for assisting producers, implementing policies and procedures, contractual risk transfer, risk analysis, risk assessment design, policy analysis, research of emerging insurance issues, alternative risk financing, and providing ongoing training to internal staff.

Promotions & Appointments

The Sandner Group—Claims Management, Environmental Claims, formerly known as Hinz Claim Management, has promoted **Martin H. Alpert, CPCU, JD, ARM**, to president, environmental claims. Alpert has more than twenty-eight years' experience with environmental claims and began his initial role as vice president, environmental claims with Hinz Claim Management in 2009. His new office is in Chicago.

Gavin Bishop, CPCU, ARe, AIS, has been promoted to senior vice president,

controller, at Validus Reinsurance, Ltd. Bishop is secretary of the Society's Bermuda Chapter and holds the CPCU, ARe, AIS, AIT, ARM, AIM, AIAF, and ARC designations. Also at Validus Reinsurance, Ltd., **Chris Holden, CPCU, ARe, AIS**, has been promoted to vice president, operational controller.

Stephen T. Brooks, CPCU, ARM, has joined Walters & Peck Agency Inc. in Bryan, Ohio, as a sales agent. Previously, he was marketing manager/broker for the Doorley Agency Inc. in East Greenwich, R.I. Brooks is a past president of the CPCU Society Rhode Island Chapter.

Doug DuMonthier, CPCU, AIC, AU, was promoted to senior commercial underwriter at Acuity. He joined Acuity in 2005 as a commercial lines underwriter.

Jim Van Farowe, CPCU, was named chief claims executive of Grange Insurance Association (GIA). He is responsible for the management of the entire claims operation of the six states in which GIA operates.

Anthony J. Hughes, CPCU, AIC, AU, has been promoted to product manager at Great American Insurance. In addition to his current responsibilities for both the NTL and leased owner/operator physical damage products, Hughes will assume responsibility for the primary package products and the dealer profit center.

Lou Iglesias, CPCU, ARM, was appointed president of the property and casualty division of Allied World U.S. He is responsible for underwriting and servicing all program, property, environmental, inland marine, and general and specialty casualty business.

G. Robert Linkous, CPCU, JD, has been promoted to underwriting manager at the Utica National Insurance Group's Middle Atlantic regional office in Richmond. He brings twenty-six years of industry experience to the group. He joined Utica in 1987 as an underwriting supervisor.

The Board of Directors of Healthcare Services Association (HSA) has appointed **Joseph B. Moody, CPCU**, president and chief executive officer of HSA and Healthcare Services Group (HSG), its wholly owned management company subsidiary, effective January 1, 2012. He will assume the position of chairman of Providers Insurance Consultants, Inc. (ProCon), HSG's agency/brokerage arm, as well. Moody was also elected president of Medical Liability Alliance (MLA) by its board of directors, effective immediately. He succeeds **Michael J. Delaney, CPCU, AAM, AIC**, who has held those positions since 2000. Delaney will continue to serve as president of the Missouri Hospital Plan (MHP), the parent of MLA.

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How to Submit Items

Send items for "Chapter News" or "Members in the News" to **Vanessa Valore** at cpcusocietynews@cpcusociety.org. Please include "CPCU News" in the subject line of your e-mail. Photos sent electronically should be saved in either tif or jpg format with a resolution of at least 300 dpi. Signed photo releases are required for all "Chapter News" photos.

Members in the News

Continued from page 13



Moody



O'Reilly



Quinley



Van Gilder

John Pham, CPCU, was named vice president of GEICO's Woodbury, N.Y. regional office. Pham joined GEICO in 1990 as a management intern and advanced through the claims ranks. Before his promotion, he served as assistant vice president in the Woodbury office.

William O. Trudeau, CPCU, AFSB, AAI, was promoted to president and chief executive officer of The Insurance Center of New England.

Michael S. Wolfe, CPCU, CIC, CRM, has been named senior vice president of Utica National's Republic-Franklin Insurance regional office in Columbus, Ohio. In addition to managing the four-state region, which includes Ohio, Indiana, Illinois, and Wisconsin, he will also serve as the regional marketing manager.

David R. Young, CPCU, CFA, has been promoted to branch underwriting manager for the Milwaukee branch office of EMC Insurance Companies. He is a

past president of the Greater Milwaukee Chapter of the CPCU Society and remains an active board member.

Honors & Achievements

Karen O'Reilly, CPCU, staff officer of Chartis Global Property in New York, is among *Business Insurance* magazine's Women to Watch in 2012, published on December 5. In her new role at Chartis, O'Reilly is charged with establishing an operating foundation for the newly organized global property team, the magazine reported. The annual feature recognizes twenty-five women doing outstanding work in insurance, risk and benefits management, and related fields.

The Rough Notes Company selected **James R. Pender, CPCU**, as a co-winner of the 2012 Community Service Award for Independent Agents. He received the award for his dedication to and organization, development, and implementation of the not-for-profit

Disabled Veterans Insurance Careers (DVIC) organization.

Kevin Quinley, CPCU, AIC, ARM, has launched a new insurance/claims consulting practice, Quinley Risk Associates, focusing on training, writing, speaking, coaching, and expert witness services.

Thomas A. Sarno, CPCU, vice president/finance of Webb Insurance Agency in Lima, Ohio, was recently elected a trustee of the Independent Insurance Agents of Ohio (Ohio Big "I"). He serves on the fifteen-member board of trustees, which guides the organization's business affairs and advocacy activities on behalf of member agencies.

PIA National named **Maureen Sexton, CPCU**, of The Hanson Insurance Group the 2012 Customer Service Representative of the Year. The Hartford Financial Services Group sponsored the award.

Colorado Business magazine named **Michael C. Van Gilder, CPCU**, CEO of Van Gilder Insurance, as medium company finalist for CEO of the Year. The company instituted a wellness program that identifies specific areas for improvement and encourages employees to stay healthy by offering incentives, the publication noted. ■

CPCU SOCIETY CHAPTER NEWS

Connecticut CPCU Society Chapter

The Connecticut CPCU Society Chapter donated \$1,000 to Gifts of Love. This local charity provides food, clothing, household items, furniture, and other aid to help individuals and families achieve or maintain self-sufficiency during temporary times of crisis.

Central Indiana Chapter Supports Annual Toy Drive

Members of the Central Indiana Chapter, along with employees from Indiana Farmers Mutual Insurance Company and the State Auto Insurance Group, contributed toys and

more than \$600 in donations to Riley Hospital for Children's Cheer Guild this past holiday season.

The Cheer Guild gives toys, books, and games to children receiving treatment at Riley. Its mission is to enhance the experience of a hospital stay for patients and their families. One of the Guild's largest programs is the Toy Room, where more than 14,000 items are distributed to patients every month.

Mississippi Magnolia Chapter Brings Holiday Joy and Toys to Sick Children

Kudos to the Mississippi Magnolia Chapter for continuing a holiday tradition that brings smiles to the faces of children



From left, Frank Scott, CPCU, Dr Tishawn Thames, Children's Hospital, Cheri Stribling, CPCU, and Jeff McGee, CPCU.

with cancer and other illnesses. As in years past, the chapter graciously donated to the Blair E. Batson Hospital for Children—this year providing a generous gift card to a local Jackson, Miss., store so kids hospitalized during the holiday season could receive toys and other gifts.

"There is no way to fully express our gratitude for your support and loyalty," said the hospital's Child Life Coordinator Dr. Tishawn K. Thames. "We at Blair E. Batson Hospital for Children are continually inspired by the dedication and generosity of donors like you who answer the call to give."

Bayou Chapter Donates to Literacy Initiative



Charles LaFleur, CPCU, AIC, AIM, left, chapter president, and Debbie O'Connor, executive director, Greater Baton Rouge Literacy Coalition.

The Bayou Chapter presented a \$500 donation to the Greater Baton Rouge Literacy Coalition on September 21. The Coalition's executive director, Debbie O'Connor,

accepted the gift and conducted an informative presentation regarding the literacy challenges in the local area and spoke to the members about volunteer opportunities. A special welcome was extended to the chapter's new designees.

Charlotte Chapter Supports Aspiring Professionals

The Charlotte Chapter sponsored two successful events recently, catering to the continuing education and encouragement of local college students in developing careers in the risk management and insurance industries.

In September, the Charlotte Chapter hosted its 15th Annual CPCU Golf Tournament for chapter members and guests. With near-record attendance and generous sponsorship, the chapter will make generous scholarship contributions to the University of North Carolina—Charlotte and Appalachian State University in support of their risk management and insurance programs. Students from both universities attended this event, enjoying a fun game of golf and networking opportunities with industry professionals.

In October, the chapter hosted twenty-nine students from both universities to a "Shadow Day" experience. Fourteen insurers, agencies and risk management departments of local firms welcomed the students, allowing them an opportunity to see the day-to-day operations of various roles, responsibilities and careers within the industry. The students then got to share their experiences with each other at a social at the end of the day.

Cleveland Chapter Collects Coats for the Needy

Thanks to the Cleveland Chapter's 2011 Winter Coat Campaign, hundreds of northeast Ohio residents have warm coats and gloves.

The chapter partnered with Love Inc., Insurance Board of Northern Ohio, Ohio Mutual Insurance Group, and insurance professionals in northeast Ohio to collect 1,200 coats for needy residents. The Ohio Mutual Insurance Group, donated a pair of gloves for every coat collected. In addition, three cleaning restoration companies donated their services: FRS Team by DKS Dry Cleaning Restoration, The Farrow Group and Certified Restoration Dry Cleaning Network (CRDN).

The coats were delivered on November 11 to St. Herman's Monastery, a men's homeless shelter; The City Mission, a shelter for men, women, and children; and Love Inc., an organization that works with local churches who minister to the poor and homeless.

Fort Worth Chapter Presents Scholarships



From left, Ian Michaud, Susan Greenwell, Chase Russell, Caroline Cremer, Erika Villavicencio, Amelia Bourassa, and Matt Brewer.

The Fort Worth Chapter presented 12 students with scholarships on October 24. The recipients were risk management and insurance majors from the University of North Texas (UNT). The chapter contributed \$10,000, with the CPCU-Loman Education Foundation matching \$6,000, for a total of \$16,000 awarded.

This year, the chapter presented the Robert Purdin Memorial Scholarship to **Caroline Cremer**. The Purdin family has been a longtime supporter of the annual golf tournament and generously donated a \$3,000 award to an outstanding risk management and insurance student.

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CPCU Society Chapter News

Continued from page 15

The chapter holds a golf tournament each April to raise funds for the scholarship program. Over the last fifteen years, it has awarded \$200,000 in scholarship funds to UNT risk management and insurance students.

Dayton-Miami Valley Chapter Donates Funds



Maybelle Snoddy, left, of Family Services, and Blake Smallwood, CPCU, AIC, AINS, chapter secretary

For its charity and Good Works project this year, the Dayton-Miami Valley Chapter supported two organizations. The chapter donated funds and items to Family Services at Wright-Patterson Air Force Base in Dayton, Ohio. Family Services supports airmen and airwomen and their families stationed at the base through its Personal Care Assistance Program.

The chapter also donated funds to the Ohio Search Dog Association, which provides nationally certified K9 search teams to assist in locating missing persons.

Connecticut Chapter Goes Out to the Ball Game

On August 11, Connecticut Chapter members Kathryn Carroll, CPCU; Marianne Vanech, CPCU; Noreen Kuziak, CPCU; Kim Fitzgerald, CPCU; and Mary Jane Bingham, CPCU, along with their families and friends went to Beehive Stadium to see the Rock Cats for the first ever "Insurance Industry Night" at the local minor league club. The CPCUs were invited onto the field to hold a huge American flag during the national anthem. The organization was recognized in front of a crowd of about 6,000 fans.

Later in the month, Kuziak was invited back to the stadium as a reward for organizing group attendance. As part of the pre-game show, all of the group leaders were invited to the field in order to announce their name and organization. Again, it was another great venue to recognize the chapter and the Society in front of thousands of fans. It was also "Autism Speaks" night, an organization that the chapter has supported in the past.

Maine Chapter Pioneer Remembered

Noyes, Hall & Allen Insurance posted a blog on December 13, 2011, in memory of Leone G. "Lee" Allen, CPCU, co-founder of Soule Allen Insurance, who passed away ten years ago on December 13, 2001. In 1961, Ms. Allen became the first woman in Maine to receive a CPCU designation. She went on to win numerous awards and accolades throughout her distinguished career.

In 2001, the Maine Chapter renamed its CPCU Award in her honor, calling it "The Lee Allen President's Award for Excellence." David E. Nadeau, CPCU, CIC, of Riley Insurance Agency was the 2011 recipient.

"Lee was a true insurance pioneer, a trailblazer and role model for the many women business leaders ...," the blog noted. Read the blog at www.noyeshallallen.com/remembering-leone-g-lee-allen-cpcu/.

Kansas City Chapter, RIMS Coordinate to Make Kansas City I-Day a Success



Captain Carol Williams, left, of the Bellefontaine Corps of the Salvation Army, and CPCU Society Chapter Governor David Keleher, CPCU, CIC, ARM

The 61st Greater Kansas City All-Industry Day Event attracted 175 insurance professionals. The Kansas City CPCU Society Chapter and the Kansas City Chapter of the Risk and Insurance Management Society co-sponsored the event, held November 11 at the Ritz Charles Convention Center.

U.S. Army Lieutenant General (Retired) John E. Miller delivered stirring opening remarks honoring veterans and new CPCU and RIMS graduates attending the event. Four continuing education classes were presented.

Keynote speaker Army Lieutenant Colonel (Retired) Mark Johnson captivated the audience with stories about Army heroes who risked their lives to save fellow soldiers. During the day, Kansas City Chapter members donated \$280 to kick off the Salvation Army Christmas Kettle Drive, and fifteen CPCUs signed up to ring bells for the Salvation Army at Crown Center on December 3.

Chicago-West Suburban Chapter Learns About Workers Comp Law Changes

Approximately forty members of the Chicago-West Suburban Chapter enjoyed an informative presentation on recent changes to the Illinois Workers' Compensation Act. The chapter thanks presenter Bill Lowry, Esq., for an outstanding presentation. Lowry is an excellent resource for anyone interested in the legal landscape for workers comp issues.



From left, Regina Dienberg, chapter secretary; Peter Quirk, past president; Barry Zalane, vice president; Bill Lowry; Laurie Pegler, president; and Michael Saporito, treasurer

UNT Welcomes Largest Gamma Iota Sigma Chapter in Texas

The University of North Texas's (UNT's) risk management and insurance program became home to the largest Gamma Iota Sigma chapter in Texas when the Beta Zeta Chapter was chartered and sixty-seven members were inducted in February.

"The installation of this chapter marks the success of more than sixty years of risk management and insurance education at UNT," said Marcia J. Staff, chair of the Department of Finance, Insurance, Real Estate and Law at UNT.

UNT has been teaching the discipline of risk management and insurance since 1949, when the School of Business Administration was created. The program continues to be an emerging area of excellence and growth for the college, according to Finley Graves, dean of the College of Business.

More than 150 people attended the installation ceremony in the university's new Business Leadership Building. Among those initiated were chapter officers Jin Na, president; Erika Villavicencio, secretary; Ian Michaud, treasurer; Amelia Bourassa, vice president, public relations; Walter Filmore IV, vice president, alumni relations; Charles Taylor, vice president, student organizations liaison; and Megan Villegas, vice president, communications/webmaster. The chapter's faculty adviser is **Debra Richardson, CPCU, CIC, CRM**, lecturer in risk management and insurance.

The chapter chartering and conferment were made possible by a grant from the Dallas-Fort Worth Chapter of RIMS.

The purpose of Gamma Iota Sigma is to promote, encourage, and sustain student interest in insurance, risk management, and actuarial science as professions; to encourage the high moral and scholastic attainments of its members; and to facilitate the interaction of educational institutions and industry through networking and by fostering research activities, scholarship, and improved public relations. ■

EDUCATION CALENDAR

May

8

Webinar

- Key Moments From the 2012 Leadership Summit

10

Webinar

- International Regulation and the Federal Insurance Office

15

Webinar

- Montrose v. Admiral – Known Loss, Montrose Exclusion, ISO's Modification

24

Webinar

- Severe Thunderstorms

29

Erie, Pa.

- Insuring Wills and Trusts: What the Insurance Professional Needs to Know

30

Hunt Valley, Md.

- Prepare for Change—The 2013 ISO Commercial Property Revisions

31

Webinar

- The Regulatory Road to Confirmation of Financial Responsibility of Vehicle Operators by Individual State Departments of Motor Vehicles

The CPCU Society will file programs for continuing education (CE) credits in states that have a CE requirement. Contact the CE compliance assistant at (610) 251-2767, for information and updates. Programs may be rejected and no credit given.

Registration

Registration and detailed content descriptions are available at the CPCU Society's website, www.cpcusociety.org.

Click on "Professional Development" and "Educational Events." Program titles are subject to change.

Oldest 2011 New Designee Shares His Story

At the age of 68, **Kenneth C. Crandall, CPCU**, achieved one of his lifetime goals—earning the CPCU designation. The Indiana resident was among 1,853 new graduates of the CPCU program honored at The Institutes' 2011 conferment ceremony in Las Vegas on October 22. Here is his CPCU story.

A 27-Year Quest



Crandall

In addition to being the senior member of the CPCU Class of 2011, I may have set another record—start-to-finish time in obtaining the CPCU designation. My records show that I passed the first exam in 1984, making this a twenty-seven-year quest!

Though I was often sidetracked by my duties as both a life insurance agent and a property-casualty agent, I managed to work in the exams over a period of years until I hit a brick wall—the dreaded final exam in the subject I liked least, accounting.

I'd order the books, start a few chapters, quit in frustration, let the books become obsolete, then contact The Institutes and order current textbooks and course guides. This cycle went on three or four times, covering a twelve-year span. Finally, I put my foot down and made a decision to finish, working through

the material each afternoon in the quiet room of the Carmel, Ind., library.

With great trepidation, I took that final exam at the test center, using up the entire three hours, to the minute. When I pushed that “submit test” button, I tensed up, then almost broke out in tears when the sign flashed, “PASSED.”

I had a couple of reasons for wanting the CPCU designation. Being a CLU, I noticed that very few agents or home office executives had the dual designation CPCU, CLU. I wanted to be one of the select few. And I wanted the knowledge I'd gain from the study.

In closing, the best line I've ever heard about procrastination is this: Start, the rest is easy!

Kenneth C. Crandall, CPCU, CLU
Crandall Insurance Co.

CHAPTER VISIBILITY SPOTLIGHT

Colorado Chapter Expands Its Marketing Reach

Unless your chapter's next speaker is a rock star, you may need help filling seats. The Colorado Chapter has found a way to “Spread the Word!” while increasing attendance. It's using Cvent, an event management and e-mail marketing tool. “We've been very pleased with the results,” says chapter president **Rick A. Bender, CPCU, AIC**, marketing manager at Colorado Farm Bureau.

Each member who receives an event invitation can invite others. “What an excellent opportunity for each of our members to ‘Spread the Word!’,” says Bender. Cvent then sends those people their own invitations, and if they respond, their data are captured in the contact management system.

Now messages are sent to members, lapsed members, part completers, candidates, other insurance groups, and other interested industry members. “We've seen an increase in meeting attendance, but we've also been able to provide more communication with our members. Our periodic

communications are going to a larger group of recipients than ever before,” he says.

Now that information is reaching more people, more members connect with students participating in Junior Achievement, for example. One such opportunity is at Business Week held at Johnson and Wales University in Denver, an annual event for high school students. “We act as facilitators for an ethics exercise,” says immediate past president **Gayle L. Hise, CPCU, AIC**, a retired insurance claim professional. Members also give talks about insurance careers, bringing CPCU's message to young people.

Among its other “Spread the Word!” activities, the chapter partners with Rocky Mountain Insurance Information Services Association (RMIIA), a not-for-profit organization that works with legislators and the community to facilitate change and raise insurance awareness. “P&C Day at the Capitol,” an annual event, offers insurance professionals the opportunity to network and interact with key legislators. ■

Share Your Story

Email your CPCU story to the Society today at cpcusocietynews@cpcusociety.org.

**Overman**

On January 26, 2012, **Dr. Edwin Scott Overman, CPCU**, president emeritus of The Institutes died peacefully with no pain in West Chester, Pa. He was eighty-nine years old. His wife of fifty-two years, Mary Katheryn Overman, and other family members were at his side.

He is survived by his devoted wife, Katheryn; daughter, Jeanne Trankle (William) of Washington, N.C.; and son, James Hunt (Jane) of Etoweh, N.C., as well as five grandchildren and twenty-one great-grandchildren.

Born August 26, 1922, in Hope, Ark., Dr. Overman started from humble beginnings on an Indian reservation in Pawnee, Okla., where his father worked. He served in the United States Army in France during World War II.

Dr. Overman received an MS degree in economics from Oklahoma State University and a PhD from The Ohio State University. He then devoted his career as an academician to the field of insurance education.

In 1953, Dr. Overman joined the American Institute for CPCU and was elected president and CEO of The Institutes in 1966, serving in that capacity until his retirement in 1987, at which time Development Hall on The Institutes' Malvern campus was renamed Overman Hall in his honor. He then served as a lifetime member of The Institutes' Board of Trustees, attaining fifty years of service to The Institutes in 2003.

Dr. Overman was inducted into the Insurance Hall of Fame in 1989, received an Honorary Doctor of Letters from Olivet College in 1985, and was the first recipient of the prestigious Franklin Award from the Philadelphia Chapter of the CPCU Society

in 1983. He received many other awards and recognitions. He served on the board of directors of Harleysville Insurance and RLI for a number of years.

By the time of his retirement, Dr. Overman was likely the best-known, most respected, and most influential person in property-casualty insurance education. He spent most of his time on the road, regularly meeting with insurance company CEOs and other industry leaders to promote the cause of professional development and ethics.

Despite his high stature in the insurance industry, Dr. Overman was a humble man and remembered his roots. He was a much-loved leader, teacher, and friend. His first love and priority, however, were his wife and his family. He will be sorely missed by all who knew him. ■

With deep regret, the CPCU Society reports the deaths of the following CPCUs:

A. J. Agan Jr., CPCU, '64
Westfield, Mass.

Richard W. Anderson, CPCU, '63
Martinsburg, W.Va.

Gerald R. Arndt, CPCU, '69
Las Vegas, Nev.

Ernest H. Bancroft Jr., CPCU, '88
Barre, Va.

Craig J. Bradshaw, CPCU, '94
Detroit Lakes, Minn.

Gerald Duane Carter, CPCU, '74
Bedford, Ind.

J. Ray Conger, CPCU, '62
Little Rock, Ark.

John P. Corn, CPCU, '51
Sandy, Utah

Denise D. Devlin, CPCU, '90
Lynn, Mass.

Normand A. Dion, CPCU, '69
Houston, Tex.

Ryan E. Ekholm, CPCU, '98
Johnston, Iowa

Lawrence E. Gille, CPCU, '00
Scott Depot, W.Va.

Kenneth W. Hayes, CPCU, '63
Des Moines, Iowa

Bernard A. Hewitt, CPCU, '01
Vero Beach, Fla.

E. Rawlings Hobbs, CPCU, '59
Belleville, Ill.

Wilson Oscar Hoefle, CPCU, '60
Waco, Tex.

Angela T. Hooper, CPCU, '97
Lacey, Wash.

Ronald C. Horn, CPCU, '63
Waco, Tex.

Ann N. Ingold, CPCU, '92
Greensboro, N.C.

James A. Johnston, CPCU, '67
Plano, Tex.

Cheryl Jones, CPCU, '11
Dallas, Tex.

James R. Jorgensen, CPCU, '56
Topeka, Kans.

Larry William Magill Jr., CPCU, '75
Bronxville, N.Y.

Robert C. Mahony, CPCU, '53
Bend, Ore.

Frank V. Marshall Jr., CPCU, '76
Ebensburg, Pa.

Michael A. Mayers, CPCU, '84
Wilmington, Del.

Becky L. McConathy, CPCU, '03
Mesquite, Tex.

David Glenn Moorhead, CPCU, '80
Palm Beach Gardens, Fla.

Walter N. Moreau, CPCU, '70
Westminster, Md.

Alan Richard Morgan, CPCU, '80
Chagrin Falls, Ohio

Emmett T. Moroney, CPCU, '62
Port Orange, Fla.

Jack Henry Nelson, CPCU, '79
Webster, Mass.

Dorothy E. Orsini, CPCU, '07
West Chester, Pa.

Donald P. Pipino, CPCU, '58
Youngstown, Ohio

Richard W. Pollard, CPCU, '83
Bryan, Tex.

Theodore A. Runck, CPCU, '66
Punta Gorda, Fla.

Robert L. Sinclair, CPCU, '70
Nashville, Tenn.

Ruth L. Spies, CPCU, '92
San Antonio, Tex.

Barbara Sue Stephenson, CPCU, '94
Dallas, Tex.

Arthur H. Stern, CPCU, '50
Chicago, Ill.

Joseph Michael Sulock, CPCU, '73
Cherry Hill, N.J.

Barbara E. Surina, CPCU, '94
San Diego, Calif.

Kenneth A. Tipton, CPCU, '55
Sarasota, Fla.

Stephen Martin Utrata, CPCU, '76
Sarasota, Fla.

We offer our sympathy to the families of these CPCUs. Memorial donations may be made to the CPCU-Loman Education Foundation in the name of any of these CPCUs. These memorials will be acknowledged to the family of the deceased.

To notify the CPCU Society of the death of a fellow CPCU, please send an e-mail to membercenter@cpcusociety.org with the name of the deceased and documentation of death, such as a published obituary. ■

Highlights from the 2012 Leadership Summit:

- *The State of the CPCU Society, presented by CPCU Society President and Chairman **Steve McElhiney, CPCU, MBA, ARe, AIAF** outlining the vision, mission and strategies of the Society going forward*
- *A spirited discussion of different generations interacting in the workplace, led by **Jane Tutoki, JD, CPCU**, executive director of Global Insurance*
- *The importance of leadership, as detailed by **Michael Useem** of the Wharton School, University of Pennsylvania*
- *Chapter governance and compliance sessions, including question and answer sessions with counsel **Kimberly Pendo**, Chicago Law Partners*
- *CPCU Society President-Elect **Dave Medvidofsky, CPCU**, and Society Treasurer and Team Manager **Brian Savko, CPCU**, delivered an entertaining "Top 10 Insights on Engaging Members Across All Generations"*
- *How to put a process in place to handle challenges that leaders may face, as explained by **H. William Dettmer**, senior partner, Goal Systems International*
- *Breakout sessions addressing specific needs regarding chapter activities, best practices, and membership development*
- *A challenge to act on lessons learned during a session led by CPCU Society Vice President **Cindy Baroway, CPCU***

