

INsight Ontario

Fall 2014



Pat Van Bakel, BA, CIP
President, Insurance Institute of Ontario

Meet Our New President

Planning to Succeed

At IIO's At the Forefront breakfast meeting in Toronto in May, our new President, Pat Van Bakel, BA, CIP, spoke about the danger in failing to plan. In contrast, for over two decades, Pat's career has been an object lesson in the rewards of planning to succeed.

Pat grew up on a farm in Mitchell, Ontario, near Stratford. His family raised beef cattle and cultivated cash crops, including corn, beans, and wheat. Early hours and chores before school were the norm for Pat as a boy, and they engrained a work ethic and self-discipline that serve him well to this day. After graduating from high school in 1990, Pat enrolled in the co-op Economics program, combining study terms and work terms, at Wilfrid Laurier University in Waterloo.

Insurance was not on his mind as Pat began his studies. But after his second year, with a work term approaching, Pat found jobs posted at the university in accounting, banking, and government, along with a single job as an independent insurance adjuster. It seemed an "outlier" that didn't fit with the others. The job piqued Pat's interest: an opportunity to be working in the field, investigating insurance claims. It seemed rather like being a special investigator—a PI! That job entailed claims adjusting for what was then Adjusters Canada Inc., a firm acquired by Crawford & Company in 1998 to form Crawford & Company (Canada) Inc.

Pat began his career in 1991 as a field adjuster, and over the next decade, he worked in branch offices all over Ontario adjusting losses in all lines of insurance. This proved excellent preparation for management. In 2001, Pat became Branch Manager of the Mississauga and Oakville

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Learning for the real world. Rewarding.

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branches, crediting strong support from colleagues for a smooth transition from the field to his first managerial role. New roles would follow with impressive regularity in the years ahead.

Pat became Director of Accident Benefits in 2003; then, Senior Project Manager in 2004, which offered great exposure to other parts of the organization, including IT, HR, and Finance. As Assistant Vice President, Field Operations, in 2006, his focus remained on operations. In 2007, Pat assumed a broader leadership role as Vice President, Operations. In 2009, he became Senior Vice President and a member of the board; in 2011, Chief Operating Officer; and in 2013, President and Chief Executive Officer.

Pat started with the Institute when he started in the industry. Each four-month work term at university included three

intensive one-week courses toward what was then the AIIC (now CIP) designation. After three work terms, Pat had nine Institute courses to his credit. In 1994, a year after receiving his degree, Pat also received his Institute designation. Pat served for several years on IIO's Faculty Committee, rising to become Chair and represent it on the IIO Academic Council. In 2011, Pat joined the IIO's Governing Council, quickly progressing through the ranks until 2013, when he became Deputy President of IIO and a member of the Board of Governors of the national Institute before assuming his new role this year as President.

Pat is aware of the effects of current industry challenges on the Institute, such as expense pressure and a major transformation of the work force. One of the challenges for the Institute is to make its members, who are part of that transformed work force, aware of the

important role the Institute plays in their careers. As President, Pat plans to highlight the Institute's success and its dynamic response to change in winning the "battle for hearts and minds."

Leading a national organization and sustaining his many volunteer commitments make time a scarce resource for Pat. In the time he does have, Pat is a devoted family man. He and his wife are proud parents of a son, aged 12, and a daughter, aged 9. Like their dad, both play hockey and golf, and Pat also acts as coach for his daughter's hockey team.

On behalf of all our members, we extend a warm welcome to Pat and wish him every success in the coming year.

2014 Grads Give Revamped FCIP Program a High Grade

Thirteen candidates in the new Fellow Chartered Insurance Professional (FCIP) Program officially gained their designations in May 2014.

"My advice is that if you are interested in taking your career to the next level, the FCIP is a great opportunity to improve your skills and provides you with the knowledge to be a real leader in this industry," said 2014 FCIP grad Anna McCrindell, Vice President of Commercial Insurance Solutions at Gore Mutual Insurance Company.

"The FCIP exceeded my expectations in terms of the high calibre of material, the relevant information, and very current information. The case studies were interesting, challenging, and applicable to many of the challenges we face today in our industry."

The 2014 grads are the first to earn an FCIP designation through the new track of the program that was launched in 2010. The online FCIP Program focuses on leadership knowledge and skills, offering a comprehensive business education with a focus on property and casualty (p&c) insurance.

This year's FCIP grads came from across Canada, in addition to one international grad from the Bahamas. They worked their way through the program's first five courses, covering topics in strategy, leadership, financial management, enterprise risk management, and emerging issues.

The candidates met in person for the first time in Toronto to present their integrative learning or "capstone" projects to a panel of evaluators in April 2014. The capstone project covers the program's final two semesters and requires candidates to apply all they have learned throughout the FCIP Program. The candidates presented on research topics related to current, real-world issues facing the industry.

"Knowing that some of the newer people within the industry are going to be going through and taking these courses gives me a great deal of confidence that the future of the p&c industry is really quite bright in this country," said 2014 FCIP grad Gerald Daviau, Director of Pricing and Analysis at Gore Mutual Insurance Company.

Do you aspire to be an industry leader? Take our short FCIP Self-Assessment Quiz at

www.insuranceinstitute.ca/AreYouReady to see if you are ready to take the next step in your career.

If you have applied for admission into the fall FCIP Program, below are key dates for the Fall semester:

Fall term dates

September 8 to November 30, 2014

Exam week

December 1–4, 2014

FCIP
Leadership Defined.

Original-Track FCIP Update

The original-track FCIP Program is closing. It is no longer possible to begin FCIP studies by this route, but the program remains available for a limited time for eligible students already in progress. Completion deadlines apply. For full details, please see www.insuranceinstitute.ca/en/cip-fcip-designations/fcip/original-track-program.aspx.

Upcoming Ontario Seminars

The Insurance Institute of Ontario's chapters offer engaging seminars to help you achieve your professional development goals and continuing education obligations. For a full listing of upcoming seminars, as well as networking events, visit your local chapter's page at www.insuranceinstitute.ca/Ontario.

Do you need CE hours in Alberta or Manitoba?

Please note our Ontario seminars are now accredited in all three provinces!

CIP Course Schedule Fall 2014

Welcome to the Fall session of CIP classes—check our website at www.insuranceinstitute.ca for the in-class and virtual options we are offering in your region. Courses are offered in a variety of time options, including evening, weekend warrior, one-week, and lunch. To find out more, visit the **CIP Courses** section of your local chapter's home page.

3rd Annual Information Sharing Day

For a third year, the Insurance Institute was pleased to welcome representatives from post-secondary schools offering full-time insurance programs as part of their curriculum. These informative sessions allow all participants to share information, experiences, and best practices.

Participants from across Canada attended the May 26 event and included learning institution representatives as well as Insurance Institute chapter managers and staff. Post-secondary schools represented were BC Institute of Technology, MacEwan University, CCNB, Conestoga College, Mohawk College, Mohawk/Sheridan College, and Seneca College.

Annual General Meeting

Attention, Members!

The Insurance Institute of Ontario held their Annual General Meeting on June 26. The successful election of Governors to The Insurance Institute of Canada took place, and the meeting saw Pat Van Bakel sworn in as IIO President and the IIO Regional Vice Chair for IIC. We would like to acknowledge and extend our gratitude for their dedication and valued contributions to our past president Donna Ince, as well as Randy Bushey and Wendy Hayden who have now completed their time on the council.

The following have agreed to serve as our Board of Governors:

Pat Van Bakel, BBA, CIP—IIO Regional Vice Chair for IIC
Tim Shauf, CIP
Tom Reikman, MBA, HBSc, CIP
For Cambrian Shield—Arlene Byrnes, BA, CIP
For Conestoga—Brent Hackett, FCIP, CIOP, EGA
For Hamilton/Niagara—Tom Pooler, FCIP, CRM
For Kawartha/Durham—Elaine Porter, CIP, CAIB
For Ottawa—Corrine McIntosh, CIP, CRM
For Southwestern—Suni Simpson-Calvert, CIP

The Nominating Committee, made up of the President, Deputy President, and Past President, with the General Manager acting in an ex officio capacity, moved the election of the councillors for 2014–2015.

Representing the membership-at-large:

Robert Fellows, MBA, FCIP, CRM, of Zurich Canada
Colin George, MBA, GDM, FCIP, CRM, of the Facility Association
Donna Ince, CA, CIP, of RSA Canada
Monica Kuzyk, FCIP, CRM, ORMP, of Curo Claims Services
Heather Masterson, FCIP, of Totten Insurance Group
Bruce Palmer, MBA, FCIP, CRM, of the Ontario Medical Association
Tom Reikman, CIP, of Economical Insurance
Tim Shauf, CIP, of The Commonwell Mutual Insurance Group
Pat Van Bakel, BBA, CIP, of Crawford & Company (Canada) Inc.

Congratulations to the Winner Spring CIP Enrolment Draw



Congratulations from all of us at the Insurance Institute of Ontario to Mubashsher Rasheed of The Cooperators in Brampton, Ontario, who had his name drawn to receive an iPad!

Fall registration is now open.

To learn more about the CIP designation, please visit our website at www.insuranceinstitute.ca/cip.

To view a list of classes in your area, visit your local chapter at www.insuranceinstitute.ca/ontario.

Scholarship Application Deadlines Are Fast Approaching

The Insurance Institute offers a number of student scholarship programs. Students enrolled at a Canadian post-secondary institution will find scholarships to help support the financial demands of their education.

Each scholarship offers something unique to students. Take a closer look.

John E. Lowes Insurance Education Fund

For 21 years, the John E. Lowes Insurance Education Fund. Since its inception, the scholarship has awarded financial assistance for up to four qualifying Ontario residents annually who are pursuing a full-time post-secondary education that includes the study of property & casualty insurance. Please see our website for a list of eligible educational organizations.

Applicants can apply between now and Friday September 26, 2014, 5:00 p.m. EST. We wish to thank the following organizations, individuals, and local chapters for their support in 2013–14.

Insurance Institute of Ontario—Conestoga Chapter
Insurance Institute of Ontario—GTA
Insurance Institute of Ontario—Hamilton/Niagara Chapter
Insurance Institute of Ontario—Kawartha/Durham Chapter
Insurance Institute of Ontario—Southwestern Chapter
MSA Research Inc. and Canadian Insurance Summit
Quarter Century Club in memory of Doug Hurlbut
Ralph Palumbo, Insurance Bureau of Canada

Interested individuals and organizations can become college or university contributors through the Contributors' Program.

Toronto Insurance Conference (TIC) Scholarships

In its second year, the TIC Scholarship Program provides the first-ever university scholarship for relatives of TIC brokers, partners, and staff.

The scholarship will annually offer financial assistance to relatives or dependents pursuing full-time Canadian university undergraduate degree programs with a concentration in business, finance, or insurance. Three scholarships are available at a value of \$5,000 each.

Scholarship applications for 2014 will be accepted from now until Friday, September 12, 2014, by 5:00 p.m. EST.

How can you lend a hand to these great endeavours? By encouraging students to apply, by attending events in support of the scholarships, and by giving generously, we make it possible for the Institute's scholarship programs to continue their work. Without industry support, these scholarships could not reach those who could benefit from them. After all, each of us benefits from encouraging students to pursue higher education and successfully graduate.



For more scholarship information, please visit www.insuranceinstitute.ca/scholarships or contact your local chapter office.

Thank You to Our Volunteers



With hundreds of volunteers throughout the province, volunteerism is the strength of the Insurance Institute of Ontario's chapters.

Every day, hundreds of insurance industry professionals voluntarily give their time and talent to the Insurance Institute of Ontario and its local chapters. Their roles vary from Career Connections ambassadors to council members and exam proctors. Through our volunteers, we have successfully served and transformed professionalism in the insurance industry.

Thank you to all of our volunteers who recently took the required AODA (Accessibility for Ontarians with Disabilities) training, or notified us that they have completed it. This training is extremely important to ensure that the Insurance Institute of Ontario meets the accessibility needs of persons with disabilities in all of our courses, seminars and events. We value your dedication to our students.

Get involved today! If you are not already part of our great network of volunteers, now is the time to be involved. Our local chapters are always looking for exam proctors and supervisors, committee members, ambassadors, and more. Volunteering has great benefits, including making new contacts and a valuable contribution to the education of the industry.

Contact your local chapter or e-mail us at iio@insuranceinstitute.ca.

Members in Action: Local Chapter's Events and Activities

CONESTOGA

Focus on Commercial Insurance at Trillium Mutual

Thirty-four participants attended our event on May 15.



Essential Management Skills

Eleven participants attended our seminar over a three day period, May 5-8.



Bonspiel

Friday April 4 saw 88 participants take to the ice at the Westmount Golf and Country Club!



HAMILTON/NIAGARA

Mohawk College Graduation

Congratulations to all students who graduated from Mohawk College's Insurance Diploma Program on Thursday, June 12.



Pictured at the convocation are: (left to right): Josh Elo, Chapter Manager Dawn Cant Elliott, James Johnson, Kylie Pemberton and Mohawk Prof. Lloyd Hobbs

GREATER TORONTO AREA (GTA)

FORE!

The weather was in our favour on June 9, as GTA members gathered for the annual CIP Society Fellows Golf Tournament. Held at Wyndance Golf Club, in Uxbridge, Ontario, Our event had a great turnout of 120 golfers!

The day wrapped up with a cocktail reception, followed by dinner. A raffle draw saw great prizes being awarded, with proceeds going to the John E. Lowes Insurance Education Fund.



OTTAWA

Trivia Night

On Thursday, June 5, the Ottawa Chapter launched an event that is sure to become an annual tradition: A Music/Trivia Challenge.

The music, provided by a local "all-insurance" band—The Endorsements—featured a selection of classic rock tunes that had a crowd of 50 singing and dancing along.

A professionally led Trivia Challenge highlighted some previously unknown competitive elements in the crowd, with fierce competition developing over whether "the Rain really does fall in Spain"—or could it be a trick question?

From the pub-style food to the relaxed social atmosphere, the most pressing concern now seems to be finding a larger venue for next year's event!



CIPs in action



Council members and students enjoy the evening

Members in Action: Local Chapter's Events and Activities Continued from page 5

OTTAWA

RIBO/OTL Licensing Course

June was a busy month, and we enjoyed having students on board to attend our RIBO/OTL Licensing class from June 2–13. We had 17 students in attendance, with one student's comment summing up the experience: "Fantastic instructors and perfectly designed course. Thank you!"



Broker Agent Licensing Class – Ottawa June 2014

SOUTHWESTERN ONTARIO

Car Rally

Southwestern Ontario hosted an amazing Car Rally on May 8 that found participants driving to various retail locations to find "exotic" things. With the entire rally being "game-oriented" this year, a big congratulations to the winners—Team Belfor!



From left to right: Sue Hawes, CIP (Stevenson & Hunt), Megan Hickman (Belfor), Nicole Roberts (Belfor), Justin Elgie (Belfor), and Christine Mansbridge (Aviva London)

SOUTHWESTERN ONTARIO

Dodgeball Tournament

March 28 was a great day for a friendly game of dodgeball. With seven teams participating, we would like to thank Forest City Sport & Social Club for helping to organize this fun event.



The top two teams pose for the playoffs!

Coming Soon - Ask the Institute



We are very excited to announce a new initiative called '**Ask the Institute.**'

Because the Institute cares about your learning experience and your success in our programs, this new source of information for students, members, and industry professionals answers the most frequent questions you ask of us.

Filled with 'need to know' material in eight popular categories, this resource will help you get ahead in your career and stay there.

This is only the beginning! The 2014/2015 syllabus will include a call out box announcing this new program. And that's not all; future plans include integrating video to provide answers to questions from actual Institute students and members. Using videos of real students and members will appeal to audio learners, and especially to those students who are now taking their classes and seminars virtually.

In this first stage of Ask the Institute the webpage, www.insuranceinstitute.ca/ask answers the questions or concerns that are typically raised by our current and potential students.

Readers are invited to contact Member Services via email if they would like additional information on any of these central questions.

We truly envision this being a valuable and relevant tool for each and every one of you – as a student, a member, and an industry professional.

Check it out on **August 1:**
www.insuranceinstitute.ca/ask



Insurance Institute