



# Institute Insider

WINTER 2001

FOR MEMBERS OF THE INSURANCE INSTITUTE OF BRITISH COLUMBIA

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## President's Message: Changes Coming for the CIP Program and IIBC



David Porter, FCIP, CRM

The word is out about the new Insurance Institute of Canada. If you were at the recent Awards Ceremony you heard the message then. For those of you who were not at the annual convocation your local Institute will be spreading the word over the next few months.

The enthusiasm and focus of the Insurance Institute of Canada has never

been more apparent than at the recent Board of Governors meeting in Victoria. The timing for the level of commitment by the national body coincides well with the efforts that the Insurance Institute of British Columbia has made over the past couple of years.

More than at any other time during my 10 years of involvement in the Institute, the national and local bodies are working together to provide exceptional service and value to our customers. We are now faced with the challenge of letting you know how the new focus of this organization can provide benefits for your career.

My last article delivered the message that participating in education is empowering. Investing the time and commitment to increase skill and knowledge produces positive dividends. With the demands of the workplace and family, the personal cost of the investment is significant.

The Insurance Institute of Canada and the Insurance Institute of B.C. are both working to make the investment more meaningful and accessible. There are changes underway nationally that are fundamental to the way that we provide serv-

ice and education to our members.

Last month in Victoria, the IIC Governors were presented with a proposal from the national Academic Council that recommended changes to the CIP program. The recommendations are for the overhaul of the CIP program. Over the next two years, nine new courses will be developed. These courses will move away from the existing theory based education towards application based learning. The idea of the revamped program will be to teach people specific skills necessary within our industry to perform tasks associated with underwriting, adjusting, and selling insurance. Our goal is to also provide transferable skills that transcend our industry into others.

The way we present exams is changing as well. Multiple-choice questions have already been introduced and that is being followed by application type questions. Instead of being asked to regurgitate a policy wording, a student will be given the policy wording and asked to apply it to a certain set of circumstances.

On a provincial level we continue to  
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## Important Dates to Remember in 2002

<i>January 7th</i>	<b>Winter Semester</b> of CIP Evening Classes Begins
<i>January 23rd</i>	<b>Perspectives on Fraud Seminar</b> – SFU Harbourside, Vancouver
<i>February 8th</i>	<b>Provincial Public Speaking Contest</b> – Vancouver
<i>February 14th</i>	<b>Making Impressions Count</b> – Dale Carnegie Seminar – SFU Harbourside, Vancouver
<i>February 19th</i>	<b>Powerful Presentations</b> – Dale Carnegie Seminar – SFU Harbourside, Vancouver
<i>March 7th</i>	<b>Western Regional Public Speaking Contest</b> – Vancouver
<i>March 26th</i>	<b>Negotiations Skills Seminar</b> – SFU Harbourside, Vancouver (tentative)
<i>April 2nd to 8th</i>	<b>CIP Examinations for Winter Semester</b>

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## President's Message *continued from page one*

work on initiatives outlined the last time we wrote to you. Progress on these items is provided throughout this newsletter. It is appropriate to comment on a couple of our significant projects here.

For over a year we have been working with Kwantlen University College to establish a program tailored to our graduates. Our intention is that our graduates will be recognized as having completed the equivalent of two years education towards a Bachelor's of Business degree. It is anticipated that this program will be launched within the next eighteen months. Our contacts with Kwantlen are pushing the model through the various stages of regulation and as we get closer we will provide you with specific details.

Another important initiative for this year has been the development of how we communicate with you. Through renewals of membership, work by our liaisons, and a little elbow grease we have been able to secure and input e-mail addresses for close to one third of our members. This allows us to communicate with you very quickly and cost effectively. To date we have already been able to send out e-mails for a few of our Fall events.

One of these events is our inaugural CIP luncheon seminar. That likely will have taken place by the time you are reading this newsletter. At the time of writing the registration for this event was well over 150 attendees. For our CIP Society members, this is just a start to many network-

ing opportunities your local CIP Society committee will provide.

As you read through this newsletter, you will realize that the items mentioned in this article are just a few of the many projects ongoing. Your local Institute and the national body are working to make the Insurance Institute a vital part of your career and its success. Over the next few months you will start to see the realization of the hard work that is going on at your local Institute. I invite you to participate in the new Institute and enjoy the benefits it will bring you and your career.

**David Porter, FCIP, CRM**  
*President*

## Professional Division Report

The Professional Division committees have been very busy this fall. Their clear mandates have focused them into an action as you will read:

### CIP SOCIETY COMMITTEE

**Chair Phil Cunningham, BA(Hons), CIP, (Mardon Group Insurance)**

Phil has undertaken the task to form BC's Chartered Insurance Professionals Society. Their goal is to become the professional arm of the insurance institute and to serve the interests of CIP & FCIP members in BC. A recent survey of graduates showed they wanted 4 things from a local CIP society:

- high end educational opportunities at the graduate level
- to keep current with industry trends
- to promote the CIP designation both inside and outside the industry
- and to provide an economic benefit package.

On October 26th the new society hosted its first inaugural lunch. The keynote speaker was John Delaney, BBA, CIP, the Chair of the National CIP society in Canada. His comments reinforced the goals of the CIP society and outlined the future direction of the national society.

On December 5th, the CIP Society presented a major luncheon seminar, *Effects of September 11th Terrorist Attacks on*

*the Insurance Industry*. Phil Cook, MBA, FCIP, CEO of the Focus Group was the seminar leader. This was an important high profile event for the society.

A social event is planned for the end of February, which will have a risk management aspect, and 2 high level graduate seminars are slated for March and April.

### FUTURE DIRECTIONS COMMITTEE

**Chair Chris Luby, FCIP, CRM**  
*(Wawanesa Insurance)*

This committee will again be surveying Insurance professionals, employers and related industries, to continue collecting research data to help shape and direct the IIBC to be the greatest benefit to you, the member.

These surveys and data will also assist in determining what and how IIBC can do to assist employers in supporting and encouraging Insurance education for the development of the employee and related benefits to the employer, as well as identify new membership streams for the continued growth and development of IIBC. They are mapping our future.

### SEMINAR COMMITTEE

**Chair Lori MacPhee, CIP, CAIB,**  
*(Vanguard Insurance Brokers)*

This diverse committee has added some interesting dimensions to the seminars

planned for IIBC members and the insurance industry in BC. To start the New Year, on Wednesday January 23rd, they are hosting the seminar "Perspectives on Fraud". It will be a panel discussion format with Colin Morrison from KPMG, Arnie Archer from Royal & SunAlliance and Inspector Bob Meanley of the Vancouver Police Department. We will be introduced to three very different perspectives on how Fraud affects the business industry.

IIBC is pleased to present two, half day, Dale Carnegie Training® seminars in February 2002. These seminars, presented by Norm Wright & Associates Ltd, will focus on *Making Impressions Count* (February 14th) while networking with others within your industry as well as providing background on how to make *Powerful Presentations* (February 19th).

Other seminars to watch for in the near future are Property Evaluation/Review of the Strata Act, Business Interruption, Negotiation Skills and Boiler and Machinery.

I am sure you will agree: the Professional Division is working hard to serve our member's needs. Contact our Committee Chairs if you have questions (see the back page for their numbers). Stay in touch and involved – this is your industry!

**Patti Kernaghan, CIP, CRM**  
*Vice-President, Professional Division*

## Academic Division Report

In October I was honoured to attend the IIC Board of Governors' meetings in Victoria with our president, David Porter. At the AGM we were both elected as Governors of the IIC. For me, it was a wonderful experience. I am always privileged to serve our members on the Council and Executive of the IIBC. However, when I attended these meetings in Victoria, it was just thrilling to be with so many people from across Canada who are eager to promote insurance related education in this country. I greatly enjoyed the opportunity to meet new people from Newfoundland to the Victoria Chapter Executive and to exchange ideas and discuss education and industry trends in general. As well, it was very informative hearing about the great strides we are taking at the National level to ensure the CIP Program remains best in class. At this meeting, we agreed to rewrite the CIP Program to enhance the course materials and include an application orientation. The IIC Academic Council is doing great work on this and I look forward to sharing developments as they take place.

### EDUCATION COMMITTEE

**Chair Carol Kuzak, FCIP, CRM**  
(*Morris Mackenzie*)

This Committee is currently revising the instructor evaluations and has developed a new questionnaire for evening class students. They will tally the results and provide feedback to the instructors within 30 days of the comments being supplied by the students. They will also provide the pass rates on exams taken by the class within 15 days of obtaining the examination results (providing total figures not individual marks). If you are interested in Instructing, please contact our IIBC Manager Neil Nason to outline your interest and areas of expertise.

### OPERATIONS COMMITTEE

**Chair Betty Pang, FCIP (BCAA)**

The Operations Committee has had a busy fall. They have been actively collecting all IIBC members' email addresses so that we can better communicate with our membership. This will allow the Institute

to get information out faster (it won't need to go to a printer to be done up) and to save costs (reducing printing and postage costs). The goal is to have this newsletter be the first that is largely distributed by email. As well, this Committee has been working diligently to arrange the Awards Day event in Vancouver.

### EXTERNAL COMMUNICATIONS COMMITTEE

**John Dickinson, BA, FCIP (ICBC)**

John and his Committee members have also been very active this fall. They are working with our company liaisons and have scheduled a Liaisons Breakfast session for November 28th. The goal of this session is to update representatives from various industry organizations on IIBC activities and seminars as well as encourage promotion of the CIP program. They are also actively exploring opportunities to promote the Institute here in BC, including advertising our graduates in the Vancouver Sun and BC Broker.

It has certainly been a busy past few months for many of us. As well, with the economy facing the current downturn, I have had some people ask me about future opportunities and whether they should

be taking or continuing with Institute courses and seminars. The thought I'd like to leave you with is this – during times of uncertainty, isn't this the best time to review your personal and professional goals? Now is the time to continue to build your professional education so you can present yourself to your current or prospective employer as the best candidate for the job.

Congratulations to our newest graduates and best wishes to you and your family for a happy and safe holiday season.

**Glenda Ouellette, BA, FCIP**  
Vice-President, Academic Division



## Vancouver Island Chapter's 1st Annual Public Speaking Contest

**IIBC's Vancouver Island Chapter NEEDS YOU!**

Participants are needed for the 1st Annual Vancouver Island Public Speaking Contest.

It's your chance to be heard! A chance to be recognized for what you think and know about property and casualty insurance related topics while demonstrating your communication skills. The Vancouver Island Chapter Public Speaking Contest will be run in January 2002. The winner will be awarded the **Insurance Corporation of British Columbia Trophy** and an all expense paid trip to compete in the Inter-Institute Public Speaking Contest in Vancouver. Winners will progress to the zone contest and then the National Finals.

For more information contact **Laura Partridge** at **250.388.5014**.



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## Vancouver Island Chapter Report

On November 23rd, 2001 members and friends of the Vancouver Island insurance community gathered once again to honour our graduates and award winners.

This popular event was held at the Victoria Golf Club with a sold out crowd of 120 attending. Eleven CIP designations and two FCIP designations were presented. Don McConaghy of Axa Pacific also received a Continuing Education Certificate and Penny Moffat received her General Insurance Essentials certificate.

Sharon Knotts of Aon Reed Stenhouse was the recipient of the National Insurance Bureau of Canada award for runner-up to the top fellow graduating with a Management Major. She also received the Norman Bortnick Memorial Gold Medal Award for top grad in British Columbia and the Axa Pacific Award for top fellow on Vancouver Island. Congratulations to Sharon!

Phil Wynn of ING Western Union presented the ING Western Union Insurance Award for top CIP graduate on Vancouver Island to Carrie Rolfsen of ICBC. Jim Robinson of CGU Insurance presented the CGU Award for runner up to the top CIP graduate on Vancouver Island to Linda Bennett of Thunderbird Insurance.

Attending from the Insurance Institute of Canada were Michael Porter, FCIP, Chairman, Board of Governors, and Peter Hohman, MBA, BSc, FCIP, CAE, President and CEO. Representing the Insurance Institute of British Columbia were David Porter, FCIP, CRM, President, his wife Kristin and Neil Nason, C.Tech, CRM, General Manager.

Special thanks go to our Awards Committee, Tara Johnson and Vicki Rowan for organizing such a wonderful event.

Our best wishes and congratulations go to the graduates and award winners.

### VANCOUVER ISLAND – FELLOWSHIP GRADUATES

**Sharon C. Knotts** – *AON Reed Stenhouse Inc.*

**Katherine Thompson** – *ICBC*

### VANCOUVER ISLAND – CIP GRADUATES

**Megan Arsenault** – *Coast Capital Insurance*

**Linda A. Bennett** – *Thunderbird Insurance*

**Doreen Causton** – *Coast Capital Insurance*

**Pamela Duguay** – *Coastal Community Insurance Agencies*

**Jennifer Goodwin** – *ING Western Union Insurance Company*

**Allan Hart** – *Coast Claims Services Ltd.*

**Lindsay Hine** – *Jardine Lloyd Thompson*

**Peter MacGregor** – *S.J. Kernaghan Adjusters*

**Steven Millar** – *Canadian Northern Shield*

**Laura Partridge** – *Bill Hartely Ins. Service Ltd.*

**Carrie Rolfsen** – *ICBC*



**Laura Ward**, CAIB, CIP  
Past President, Vancouver Island Chapter

## Awards Day 2001 Report

*The 2001 Annual Awards Luncheon was held at the Renaissance Hotel on Thursday, 22 November 2001.  
The function which honoured our graduates and award winners had in excess of 350 attendees.  
The graduating class of 2001 consisted of 74 CIP Graduates, 12 FCIP Graduates and 11 GIE Graduates.  
The Award Winners are:*

### GENERAL INSURANCE ESSENTIALS

*Top Graduate Award – David Mung, Insurance Corporation of British Columbia*

### CHARTERED INSURANCE PROFESSIONALS

*Leonard J. De Vito Memorial Gold Medal Award – Aidan Butterfield*

*Sponsor: Insurance Corporation of British Columbia*

*Malcolm C. Simpson Memorial Silver Medal Award – Kiejoon Kim, City of Abbotsford*

*Sponsor: BC Insurance Adjusters' Association*

*Advance Claims Service Bronze Medal Award – Paul Mendham, TOS Insurance Services*

*Sponsor: Advance Claims Service*

### FELLOW, CHARTERED INSURANCE PROFESSIONALS

*Norman Bortnick Memorial Gold Medal Award – Sharon Knotts\*, AON Reed Stenhouse Inc., Victoria*

*Sponsor: Insurance Corporation of British Columbia*

*\*Sharon Knotts was also a National Award winner receiving the Insurance Bureau of Canada prize presented to the Canadian runner-up to the top graduate in the management major of the FCIP program.*

*Canadian Insurance Professionals of Vancouver Silver Medal Award – Lynne Vetter, Wawanesa Mutual Ins Co.*

*Sponsor: Canadian Insurance Professionals of Vancouver*

*Robert Yates Memorial Bronze Medal Award – Linda Riches, CGU Insurance Company of Canada*

*Sponsor: BC Insurance Adjusters' Association*

### CONTINUING EDUCATION CERTIFICATES

*Donald Lee McConaghy, Claims Major – AXA Pacific Insurance Company, Victoria*

*Verna Martin, Risk Management Major – Lombard Canada Ltd.*

*Shaun Reid Sinclair, Risk Management Major – AON Reed Stenhouse Inc.*

### INSTRUCTOR OF THE YEAR AWARD

*David C. Skingsley Memorial Award for Instructor of the Year – Rick Pickens, Pemberton Insurance Corporation*

*Sponsor: British Columbia CIP Society*

In attendance from the Insurance Institute of Canada were Michael Porter, Chair, Board of Governors, and Peter Hohman, MBA, B.Sc., FCIP, CAE, President and CEO.

The function was hosted by C. David Porter, FCIP, CRM, President, Insurance Institute of British Columbia. A special thanks to the Operations Committee and Leah Sangster, Executive Assistant, IIBC for organizing the function under the guidance and direction of Neil Nason, General Manager, IIBC.

We would like to take this opportunity to congratulate all graduates and award winners for their accomplishments and thank everyone for coming out to recognize and celebrate the achievements of the graduates of the Insurance Institute of Canada.

**Betty Pang**, FCIP  
*Chair, Operations Committee*

## Awards Day 2001 Report



*Above and left:*  
CIP Graduates, 2001



*Left:*  
FCIP Graduates, 2001