

# URMIA's 42<sup>nd</sup> Annual Conference



September 10-14, 2011 | Portland, OR  
Portland Marriott Downtown Waterfront

*Registration Opens in May!*



# Join us for Expedition Risk!

## What's in Store for You at URMIA's 42<sup>nd</sup> Annual Conference?

- Learn to map and navigate your institution's unique risks and forge ahead into uncharted territories.
- Don't miss special pre-conference workshops highlighting Enterprise Risk Management (ERM) and providing an introduction to risk management in higher education.
- Get important updates on international risks through a special series of breakout sessions.
- Make lasting professional relationships through our many networking opportunities, most of which are included in your registration.

### Conference Registration Rates

To make our conference as accessible as possible, rates have increased by only \$50 since 2007.

Register at: [www.urmia.org/annual/2011](http://www.urmia.org/annual/2011).

Member Type	Early Bird	On or After 8/1/11	On or After 9/1/11
Institutional Member	\$575	\$675	\$775
Affiliate Member	\$675	\$775	\$875
Non-Member	\$775	\$875	\$975

### Keynote Speakers, General Sessions, and Other Educational Opportunities

Sunday, September 11, 3:00-5:00 pm

**NEW MEMBER AND FIRST TIMER SESSION:** If you are new to URMIA or the conference, don't miss this opportunity to meet URMIA's leaders and make new friends before the opening reception.



Monday, September 12, 8:55-10:00 am

**KEYNOTE ADDRESS - "What Keeps a University System Chancellor Awake at Night?,"** with George Pernsteiner, *Chancellor, Oregon University System*

Monday, September 12, 11:50 am-1:15 pm

**AWARDS LUNCHEON AND ERM UPDATE - Where We Are Now**

Congratulate your colleagues as we announce the recipients of the Distinguished Risk Manager Award and the Innovative Risk Management Award, and don't miss a special update from those featured in our 2007 Enterprise Risk

Management (ERM) white paper! Learn how pioneering ERM programs at several different institutions of higher education have matured and evolved since the white paper was written.

Monday, September 12, 4:15-5:00 pm and Tuesday, September 13, 4:30-5:15 pm

**URMIA COMMITTEE MEETINGS:** URMIA's success depends on your participation in our member led committees. Get involved by attending a committee meeting at the conference!

Tuesday, September 13, 8:00-9:00 am

**GENERAL SESSION - "Internationalization: A View from the Top,"** with William Nicholson, *Duke University*, Madeleine F. Green, *International Association of Universities*, and D. Jean Demchak, *Marsh*

Tuesday, September 13, 12:10-1:25 pm

**ANNUAL BUSINESS MEETING:** Join us for the induction of new officers, passing of the gavel, and previews of the 2012 and 2013 conferences.

Wednesday, September 14, 8:00-9:15 am

**GENERAL SESSION - "Managing Student Organizations: A Tale of Two Public Universities,"** with Cheryl Lloyd, *University of California*, Andrew Goldblatt, *University of California, Berkeley*, and Joyce Fred, *Oregon State University*



## Pre-Conference Workshops

### Pre-Conference Workshop #1

*Associate in Risk Management Review Session -  
ARM 54-Risk Assessment*

Saturday, September 10, 9:00 am-3:00 pm  
ADDITIONAL FEE REQUIRED; *register online*.  
Kick off your trip to Portland by taking the next step on your professional development path. Don't miss this chance to review for the first class in the ARM series of courses, ARM 54-Risk Assessment. The ARM is a nationally recognized designation that enhances your risk management skills by teaching you how to build and implement a balanced risk strategy using retention, transfer, and hybrids. *URMIA will also offer proctored exams for the ARM 54, ARM 55, and ARM 56 for an additional fee on 9/11/11, 3:00-5:00 pm.*

### Pre-Conference Workshop #2

*Risk Management 101  
in Higher Education*

Saturday, September 10,  
1:00-5:00 pm  
FREE FOR CONFERENCE  
ATTENDEES! *Register online*. Back by popular demand, URMIA is proud to offer this primer in risk management for the third year - and we have improved it based on your comments! This workshop provides a solid foundation for professionals new to risk management or to higher education and those who have risk management as one of many other responsibilities.



### Pre-Conference Workshop #3

*Enterprise Risk Management (ERM) Boot Camp*

Sunday, September 11, 8 am-12 pm; ADDITIONAL FEE REQUIRED; *register online*.  
In our current economic climate, it has never been more important for risk managers to look to the future and help others understand the complexities of the full range of risks facing higher education. Don't miss this ERM boot camp, which will help you develop and implement a successful ERM program on your campus. Attendees will learn about creating a risk-aware campus culture, aligning your ERM program with your institution's efficiency efforts, and creating buy-in to apply ERM concepts to current operations. Hear from those who have implemented ERM programs at their campuses, and use their insights about what worked and what didn't to help your ERM program succeed.

## Special Thanks to Our Sponsors...

For a complete list of sponsors, visit [www.urmia.org](http://www.urmia.org).

Marsh USA Inc. - *Gala*  
FM Global - *Conference Gifts and Bags*  
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*Opening Reception and Golf Outing*  
Chartis - *Dessert Reception at Gala, Break, and  
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Aon Risk Services - *Breakfast*  
United Educators Insurance - *Breakfast*  
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TD Insurance, Inc. - *URMIAcares*  
Terra Dotta - *General*

# Conference Schedule at a Glance

## Saturday, September 10

8:00 am-4:00 pm	URMIA BOARD OF DIRECTORS MEETING - With 2010-2011 President J. Michael Bale
8:00 am-5:00 pm	CONFERENCE REGISTRATION OPEN
9:00 am-3:00 pm	PRE-CONFERENCE WORKSHOP #1: Associate in Risk Management Review Session - ARM 54-Risk Assessment ( <i>Additional fee</i> )
1:00-5:00 pm	PRE-CONFERENCE WORKSHOP #2: Risk Management 101 in Higher Education ( <i>Free! See conference website for information</i> )
6:00-9:00 pm	PRESIDENT'S RECEPTION ( <i>Invitation only; for new members, first time attendees, Annual Conference Committee, and URMIA's leadership</i> )

## Sunday, September 11

7:30 am-2:00 pm	GOLF OUTING ( <i>Additional fee</i> )
8:00 am-5:00 pm	CONFERENCE REGISTRATION OPEN
8:00 am-12:00 pm	PRE-CONFERENCE WORKSHOP #3: Enterprise Risk Management (ERM) Boot Camp ( <i>Additional fee</i> )
1:00-4:00 pm	URMIACares COMMUNITY SERVICE EVENT
3:00-5:00 pm	NEW MEMBER AND FIRST TIMER SESSION
3:00-5:00 pm	PROCTORED EXAM FOR ARM 54, ARM 55, and ARM 56 ( <i>Additional fee</i> )
8:00-11:00 pm	OPENING RECEPTION - The World Forestry Center

**Save \$100 by registering before August 1, 2011!**



## Monday, September 12

7:15-8:00 am	FIFTH ANNUAL ALL AFFILIATES MEETING
7:15-8:15 am	BREAKFAST
8:00 am-5:00 pm	CONFERENCE REGISTRATION OPEN
8:15-8:50 am	WELCOME AND ASSOCIATION HIGHLIGHTS - President Mike Bale, Executive Director Jenny Whittington, and Conference Chairs Joyce Fred and Cheryl Lloyd
8:55-10:00 am	KEYNOTE ADDRESS - "What Keeps a University System Chancellor Awake at Night?," George Pernsteiner, <i>Chancellor, Oregon University System</i>

*Breakout Sessions*  
10:20-11:50 am

**Campus Threat Assessment and Management in 2011: What Risk Managers Need to Know Now**  
Richard Wilson, *Arizona State Univ. Police Department*  
Jennifer Grove, *Clark College*  
Jeffrey J. Nolan, *Dinse, Knapp & McAndrew, PC*

**Information Technology Trends and Implications for Privacy, Security, and Risk Management**  
Brian Nichols, *Louisiana State Univ.*  
Cathy Hubbs, *American Univ.*  
Rodney Petersen, *EDUCAUSE*

**Litigation Trends Driven by Large Losses**  
Ken Zick, *Wake Forest Univ.*  
D. Jean Demchak, *Marsh*

**Navigating Successful Campus Construction: Owner Controlled Insurance Programs**  
Brian Burns, *Northeastern Univ.*  
Fitzroy Smith, *George Washington Univ.*  
Bonney J. Hebert, *Academic Risk Resources and Insurance, LLC*  
Fran McCormack, *Academic Risk Resources and Insurance, LLC*



## Monday, September 12 (continued)

11:50 am-1:15 pm	AWARDS LUNCHEON AND ERM UPDATE - "Where We Are Now," Grace Crickette, <i>University of California</i> ; Christine Eick, <i>Auburn University</i> ; Ellen Shew Holland, <i>University of Denver</i> ; Gary Langsdale, <i>Pennsylvania State University</i> ; and Ruth Unks, <i>Maricopa County Community College District</i>			
<i>Breakout Sessions</i> 1:30-2:45 pm	<b>Brave New World of Cyber Risks: Don't Take This Trail Without a Map</b> Rodney Petersen, <i>EDUCAUSE</i> Glenda Heinlein, <i>Aon Risk Solutions</i> Holly K. Towle, <i>K&amp;L Gates, LLP</i> Steven Pacheco, <i>ACE USA</i>	<b>Mock Trial: Smart Strategies for Managing Difficult Risks - Student Group Alcohol Use and Hazing</b> Bruce Morgan Casner, <i>Risk Management Foundation</i> Kurt Gerstner, <i>Campbell Campbell Edwards &amp; Conroy, P.C.</i>	<b>The Advantages of the Alternative Market During a Soft Market Economy</b> Larry V. Stephens, <i>Indiana Univ.</i> Leta Finch, <i>Arthur J. Gallagher Risk Management Services</i> Steven Stoeger-Moore, <i>Districts Mutual Insurance</i>	<b>To Arm or Not to Arm</b> Paul Clancy, <i>Boston Univ.</i> Ronald J. Guilmette, <i>Merrimack College</i> Allison C. Ayer, <i>Nelson, Kinder, Mosseau, &amp; Saturley, PC</i> Laurie Bishop, <i>Nelson, Kinder, Mosseau, &amp; Saturley, PC</i>
<i>Breakout Sessions</i> 3:00-4:00 pm	<b>Blueprints for Communication: Building Bridges to Your Senior Management and Beyond</b> Marjorie F.B. Lemmon, <i>Yale Univ.</i> Michael Christian, <i>Risk Strategies Company</i>	<b>Staying on the Trail: Avoiding Potential Pitfalls of Club and Intramural Sports Risk and Injury Management</b> Renee Block, <i>Rice Univ.</i> John Hunt, <i>Univ. of Southern Indiana</i> Carol Malouf, <i>Summit America Insurance Services, LC</i>	<b>The New World of Social Media: Business and Legal Risks for Higher Education</b> Tina Dobleman, <i>Stanford Univ.</i> Rennie Muzii, <i>Marsh</i> Tamara Russell, <i>Barran Liebman</i>	<b>URMIA TULIP Program: Risky Business No More</b> URMIA National Office
4:15-5:00 pm	URMIA COMMITTEE MEETINGS			
6:30 pm	MEET AND GREET DINNERS			

## Tuesday, September 13

7:30-8:00 am	BREAKFAST			
8:00 am-5:00 pm	CONFERENCE REGISTRATION OPEN			
8:00-9:00 am	GENERAL SESSION - "Internationalization: A View from the Top," William Nicholson, <i>Duke University</i> , Madeleine F. Green, <i>International Association of Universities</i> , and D. Jean Demchak, <i>Marsh</i>			
<i>Breakout Sessions</i> 9:20-10:35 am	<b>Developing an Institutional International Travel Policy and Procedure: How to Begin</b> Ben Levy, <i>Ramapo College of New Jersey</i> Donna Mainardi Singer, <i>Ramapo College of New Jersey</i>	<b>Additional Insureds: Who, What, When, Where, How, and Why Not</b> David Snowe, <i>Pennsylvania State University</i> John C. Tarpey, <i>Willis</i>	<b>Reverse Engineering Cyber Insurance</b> Grace Crickette, <i>Univ. of California</i> Shelton Waggener, <i>Univ. of California, Berkeley</i> David Evans, <i>Alliant Insurance Services</i> James Calder, <i>Price Forbes &amp; Partners Ltd, London</i>	<b>ROTC and the Risk Manager: What You Should Know About Hosting Military Training on Your Campus</b> Paul Allen, <i>Miami Univ.</i> David F. Schwallie, <i>Univ. of Cincinnati</i>
<i>Breakout Sessions</i> 10:55 am-12:10 pm	<b>Risk Management and Compliance Considerations for International Programs</b> Craig McAllister, <i>Cornell Univ.</i> Bob Lammey, <i>High Street Partners, Inc.</i>	<b>Contractual Risk Transfer: An Expedition That May Not Be Worth the Risk</b> Donna McMahon, <i>Univ. of Maryland, College Park</i> Steven Kahn, <i>Aon Risk Services</i>	<b>David and Goliath: Conquering the Risk Challenges of the Smaller Institution</b> Edward Guy, <i>Oregon Institute of Technology</i> Sandy Serbalik, <i>Siena College</i> Joyce K. Fred, <i>Oregon State Univ.</i>	<b>Executive Leadership: Execution of a Total Cost of Risk Model</b> Phillip B. Dendy, <i>Univ. of Texas System</i> Amy L. Coughlin, <i>Univ. of Notre Dame</i> Gary W. Langsdale, <i>Pennsylvania State Univ.</i>
12:10-1:25 pm	ANNUAL BUSINESS MEETING			

## Tuesday, September 13 (continued)

<p><i>Breakout Sessions</i> 1:35-2:50 pm</p>	<p><b>Foundations for Managing the Unexpected Abroad: Medical Standards, Security Concerns, and Faculty Preparation</b> Julie Friend, <i>Michigan State Univ.</i> Landes Holbrook, <i>Brigham Young Univ.</i> Frank Gillingham, <i>HTH Worldwide</i></p>	<p><b>Don't Panic! How to Get Through Certificate of Insurance Issues Without Going Crazy</b> Gregory Clayton, <i>Univ. of Nebraska, Lincoln</i> Michael Jackisch, <i>Marsh</i> Brenda Dutcher, <i>United Educators Insurance</i></p>	<p><b>Slippery Trails: The Art of Managing Vehicle Risks</b> Elizabeth J. Carmichael, <i>Five Colleges, Inc.</i> Jon Hankey, <i>Virginia Polytechnic Institute and State Univ.</i> Chris Duble, <i>Fred C. Church Insurance</i> Chris Hayes, <i>Travelers</i></p>
<p>3:10-4:25 pm</p>	<p><b>The Varied Approaches to Managing International Travel Risk for Colleges and Universities</b> Sam Florio, <i>Santa Clara Univ.</i> Cheryl Lloyd, <i>University of California</i> Ken Banks, <i>Arthur J. Gallagher Risk Management Services</i> Mark McCracken, <i>Europ Assistance USA</i></p>	<p><b>An Evolutionary Approach to Employment Disputes: Managing Risk From the Very Start</b> Jill Lee, <i>Univ. of Washington</i> Elizabeth Cherry, <i>Univ. of Washington</i></p>	<p><b>Working With State Governments: An Expedition Worth The Risk</b> Donna McMahon, <i>Univ. of Maryland, College Park</i> Donna Smith, <i>Univ. of New Mexico</i> Steven Kahn, <i>Aon Risk Services</i></p>
<p>4:30-5:15 pm</p>	<p><b>URMIA COMMITTEE MEETINGS</b></p>		
<p>6:00 pm</p>	<p><b>GALA EVENT - The McMenamins Crystal Ballroom</b></p>		



## Wednesday, September 14

<p>7:30-8:00 am</p>	<p><b>BREAKFAST</b></p>		
<p>8:00 am-12:00 pm</p>	<p><b>CONFERENCE REGISTRATION OPEN</b></p>		
<p>8:00-9:15 am</p>	<p><b>GENERAL SESSION - "Managing Student Organizations: A Tale of Two Public Universities,"</b> Cheryl Lloyd, <i>University of California</i>, Andrew Goldblatt, <i>University of California, Berkeley</i>, and Joyce Fred, <i>Oregon State University</i></p>		
<p><i>Breakout Sessions</i> 9:40-10:55 am</p>	<p><b>Emergency Planning: The Risk Management Role and Assistance from FEMA</b> Donna Pearcy, <i>Univ. of Iowa</i> Mark Briggs, <i>Safety Management Resources Corporation</i></p>	<p><b>Managing the Threatening Student in a Timely (and Legal) Manner Within the College Environment</b> Miriam Feldblum, <i>Pomona College</i> John Lane, <i>Control Risks North America</i> Glen Kraemer, <i>Curiale Hirschfeld &amp; Kramer, LLP</i></p>	<p><b>Introduction to the NACUBO/URMIA International Resource Center</b> Paul D. Pousson, <i>Univ. of Texas System</i> Jenny Whittington, <i>URMIA</i> Marta Perez Drake, <i>NACUBO</i></p>
<p><i>Breakout Sessions</i> 11:15 am-12:15 pm</p>	<p><b>Beware of Greeks Bearing Exclusions</b> David L. Carroll, <i>California Polytechnic State Univ.</i> Andrew Goldblatt, <i>Univ. of California, Berkeley</i></p>	<p><b>Emerging Issues and Risk Management in Higher Education</b> Erica Healand, <i>Eastern Michigan Univ.</i> Abraham Kane, <i>Genesis Underwriting Management Company</i> Anthony Rey, <i>Marsh USA, Inc.</i></p>	<p><b>The University Student Employee: What Were They Thinking?</b> Steven Thygerson, <i>Brigham Young Univ.</i> Glenn M. Johns, <i>Brigham Young Univ.</i></p>
<p>12:30-1:45 pm</p>	<p><b>FINAL RAFFLE, LUNCH, AND CONFERENCE CLOSING</b></p>		
<p>1:45-3:45 pm</p>	<p><b>URMIA BOARD OF DIRECTORS MEETING - With 2011-2012 President Steve Bryant</b></p>		

# Other Activities and Events

## **Golf Outing** (additional fee required)

Sunday, September 11, 7:30 am-2:00 pm

The golf outing is a great chance to see old friends or make new ones before the conference starts. This year's outing will be at the Langdon Farms Golf Club. Learn more at the conference website!



## **Guest Tours** (additional fee required)

Sunday, September 11; Monday, September 12; and Tuesday, September 13

This year's guest tours will explore the unique beauty of the Pacific Northwest. On Sunday, guests and attendees can join us for the "Columbia River Gorge Highlights Adventure." On Monday, guests shouldn't miss a day trip to Cannon Beach and the beautiful beaches and coast of Oregon. On Tuesday, guests can explore gorgeous gardens and the Pittock Mansion on the "Mansion and Gardens Adventure."



## **URMIAcared Community Service Event**

Sunday, September 11, 1:00-4:00 pm

URMIAcared turns four this year! Each year, this volunteer event allows conference attendees and guests the chance to give something back to the surrounding community. Due to its continued popularity, we will offer volunteers the choice of a number of different volunteer locations and activities.

## **Opening Reception at the World Forestry Center**

Sunday, September 11, 8:00-11:00 pm

With some of the highest recycling and bike commuting rates in the nation, Portland ranks as one of the country's greenest cities. With its abundance of trees, though, the city is also quite literally green! Come to our special opening reception at the World Forestry Center to welcome old friends, meet new ones, and learn more about what makes Portland special. Casual dress or school colors are encouraged.

## **Meet and Greet Dinners**

Monday, September 12, 6:30 pm

URMIA guides will lead small groups to a local restaurant for a "Dutch" treat dinner. Sign up at the registration desk.



## **Gala Event at the McMenamins Crystal Ballroom**

Tuesday, September 13, 6:00 pm

Come for the conference, stay for the dinner, dancing, and live entertainment! Our gala will include a performance of "Voices from the Oregon Trail" by the Trail Band, a group of musicians who re-create the story of the Oregon Trail through folk ballads, marches, hymns, and fiddle hoedowns. Come and enjoy one last evening with your colleagues. Casual Western attire is encouraged.



## **Final Raffle, Lunch, and Conference Closing**

Wednesday, September 14, 12:30-1:45 pm

We will raffle off items throughout the conference, but this will be the grand finale. Raffle proceeds support URMIA's scholarship program, so raid your campus bookstore and bring a donation for this fun URMIA tradition.

**Stay tuned for more on our conference scholarship program!**



University Risk Management and  
Insurance Association  
P.O. Box 1027  
Bloomington, IN 47402-1027  
[www.urmia.org](http://www.urmia.org)

## Register Today! URMIA's 42<sup>nd</sup> Annual Conference

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