

Agenda 2 | 2021 Technology, Human Resources, and Finance Workshop

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Wednesday, September 15, 2021

(All times Eastern Daylight Time)

11:00 a.m. Welcome and Introductory Remarks

Cynthia Cox, Chair, Technology, Human Resources, and Finance Section

11:00 a.m.-12:00 p.m. Keynote

You: In the Pilot's Seat

Elizabeth McCormick, Black Hawk Pilot, Soar 2 Success International, LLC

Former U.S. Army Black Hawk Pilot, Elizabeth McCormick, shares the professional development secrets for success with her stories of overcoming overwhelming obstacles as a helicopter pilot while inspiring you to Soar 2 Success! Learn how to unlock the key to boosting your confidence, elevate your effectiveness with customers and co-workers, discover the #1 success principle while learning to fly a helicopter (yes, really!), and soar to a higher level of advancement through influencing others to lead.

12:00-12:30 p.m. Coffee Talk sponsored by Guy Carpenter and Johnson Lambert

Join your colleagues for a relaxed, interactive discussion—follow-up on interesting topics from the program or just catch up and enjoy each other's company!

12:30-1:30 p.m. General Session

Politics, Policy, and the Data Sharing Project—2021 MPL Association Update

Michael C. Stinson, JM, Vice President of Government Relations & Public Policy, MPL Association

P. Divya Parikh, MPH, CAE, Vice President of Research & Education, MPL Association

Hear updates from two of the MPL Association's key programs that support the member interests in the areas of public policy and strategic data collection and analysis. Michael Stinson will discuss federal legislative and regulatory activity this year, and what we can expect from Washington, D.C., in the coming months. He will also review what actions state legislatures have taken in 2021 and what that might mean for MPL insurers in 2022. Divya Parikh will review the current trends from the MPL Association Data Sharing Project (DSP) closed claims data. Using details on events and characteristics of the types of claims reported, analyses of DSP data have provided a foundation for claims management, underwriting considerations, risk management, and patient safety programs for Association insurers for decades.

In addition, Stinson and Parikh will provide an update on the ongoing efforts of the Association's COVID-19 Litigation Group that meets regularly to discuss the impact of the pandemic on physicians as well as potential liability claims.

1:30-1:45 **Break**
p.m.

1:45-2:30 **Finance Session**
p.m. **Private Markets and Alternatives for Insurers**
Matthew Addesa, Director, Private Markets and Alternatives, DWS Investments

Insurance companies continue to search for yield and return beyond traditional fixed income. Matthew Addesa will explore asset classes and market opportunities across real estate, private credit, and infrastructure in both equity and debt. Hear how private markets and alternative investments complement traditional asset classes and gain an understanding of the regulatory framework for and capital-efficient access to private market alternatives.

2:30-3:00 **Coffee Talk sponsored by SLC Management**
p.m. Join your colleagues for a relaxed, interactive discussion—follow-up on interesting topics from the program or just catch up and enjoy each other's company!

3:00-3:45 **Finance Session****p.m.** **Insurer Investment Portfolios and ESG**

Moderator: T.C. Wilson, Chief Investment Officer, The Doctors Company

Panel:

Matthew Daly, CFA, Managing Director, Conning

Nicole Marchand Ross, Director, Financial Institutions Group, BlackRock

Insurance companies are becoming increasingly focused on environmental, social, and governance (ESG) factors as stakeholders are seeking a better understanding of how insurers assess and manage these aspects within their operations and reporting platforms. In addition to investment policies, ESG awareness is growing in various areas of the business including governance and company culture. Many investment managers are keenly attuned to ESG factors and have enhanced their credit research teams to include it an integral part of their framework.

T.C. Wilson, chief investment officer at The Doctors Company, will lead a focused discussion with professionals from BlackRock and Conning, each of whom manage invested assets for insurance industry clients, including MPL insurers. Panelists will consider emerging issues relating to ESG and integration strategies for MPL insurers to consider when formulating or expanding investment policy. ESG adoption is likely to become more visible for insurers and explicitly included in their investment criteria at varying levels of engagement. Increased attention from rating agencies and regulators may spur insurers to become more transparent in their ESG investment practices as well.

3:45-4:00 **Break****p.m.**

4:00-4:45 **Finance Session****p.m.** **STAT and GAAP Accounting Update**

Dave Osborn, CPA, Managing Director, Ernst & Young LLP

J.D. Stadler, CPA, Senior Manager, Ernst & Young LLP

Get up-to-date on the latest statutory accounting (STAT), Generally Accepted Accounting Principles (GAAP), tax, and auditing developments impacting the insurance industry. Find out what National Association of Insurance Commissioners (NAIC) and Financial Accounting Standards Board (FASB) activities you should monitor in the year ahead.

Thursday, September 16, 2021

(All times Eastern Daylight Time)

11:00 a.m.-12:00 p.m. **General Session**
Artificial Intelligence and MPL: Today, Tomorrow, and Beyond
Andrew Arruda, JD, CEO and Co-founder, Automate Medical

Join artificial intelligence (AI) pioneer, Andrew Arruda, as he provides an inside look into where AI is today and how it may shape the world of medical professional liability in the future. Arruda will explore the history of AI as well as several misconceptions regarding its development and then provide a modern, up-to-date definition of what constitutes AI today. Hear about real-world AI applications being used in other fields and examine the implications in medical defense work, the practice of medicine, and medical professional liability. Leave this session with ideas about how to best prepare for tomorrow's reality.

12:00-12:30 p.m. **Coffee Talk sponsored by Sapiens International**
 Join your colleagues for a relaxed, interactive discussion—follow-up on interesting topics from the program or just catch up and enjoy each other's company!

- **General Session**
CEO Panel: Post Pandemic Operations Innovation
Moderator: Judy Busby, Senior Vice President, Executive Search and Corporate Strategy, The Jacobson Group
Panel:
Michelle Hoppes, President & CEO, Michigan Professional Insurance Exchange
Chris Kenny, CEO, Medical and Dental Defense Union of Scotland
Michael J. Schoppmann, Esq., CEO & Vice Chair, MLMIC Insurance Company

1:30-1:45 p.m. **Break**

1:45-2:30 p.m. **Human Resources Session**
2021 Labor and Employment Legal Developments
Christina Meddin, JD, Partner, Seyfarth Shaw LLP

The legal landscape in human resources continues to evolve. Join us for a discussion on the current environment for professionals in human resources and the impact new legislation and regulation will have on all workplaces. Also, learn about new challenges brought on by the pandemic including appropriately managing return to work (fully remote vs. hybrid vs. full-time in the office), COVID-19-related employee leave, and the ongoing debate on return to work and vaccinations. This session will deliver best practices and important take-aways.

1:45-2:30 **Technology Session**

p.m.. **Emerging Technology—AI, Cloud Tech, Modern Tech**

Kevin Bulebush, VP of Engineering, Curi

Fred Danback, SVP, CIO and CISO, Healthcare Risk Advisors, The Doctors Company

Leo Dias, BEng, MSc, Director, Information Services, HIROC

In this panel discussion, hear from other MPL IT leaders who are evaluating or using emerging technologies, such as AI, as well as leveraging cloud solutions. Learn what the drive was for considering or using these technologies, challenges, lessons learned, and, most important, outcomes.

2:30-3:00 **Break**

p.m.

3:00-3:45 **Human Resources Session**

p.m. **Answering the Question: What Are We Doing About Diversity, Equity, and Inclusion?**

DeDe Church, Esq., Principal, DeDe Church & Associates, LLC

If you've asked, been asked, or expect to be asked, "So what are we doing about DEI," this is the session for you! Attendees will unpack the foundations of implicit bias and how it affects the workplace. Using that knowledge as a starting point, participants will discuss practical steps to help ensure that all of employees enjoy an inclusive and equitable work environment.

3:00-3:45 **Technology Session**

p.m.. **Ransomware and Cyber Risks—Preparing and Responding**

Joseph Dickinson, JD, Esq., CHPC, Partner, Michael Best & Friedrich

A leading expert on data privacy and cybersecurity risk and response, Joseph Dickinson, provides his unique perspective on trending cybersecurity threats. With the rise of ransomware attacks targeting financial services, insurance, and healthcare it is critical that companies of all shapes and sizes understand how to reduce the risk of an incident and, if one occurs, how to handle the impact. This session will help attendees learn how to best prepare and respond.

3:45-4:00 **Break**
p.m.

4:00-4:45 **Human Resources Session**
p.m. **HR Roundtable—Post-pandemic HR Strategies**
Moderator: DeDe Church, Esq., Principal, DeDe Church & Associates, LLC

The pandemic placed human resources at the forefront of all business operations. From remote work to remote recruiting, COVID-19-related leave, staff communication, and employee relations, human relations strategies changed, evolved, or completely turned upside down. This interactive roundtable session with moderator Dede Church will explore the successes and challenges faced by your human resources peers and include actionable information to help you lead your company's strategy going forward.

4:00-4:45 **Technology Session**
p.m.. **IT Roundtable**
Moderator: Darren Palmer, Vice President & Chief Information Officer, Mutual Insurance Company of Arizona

Over the past year, the pandemic has shone a spotlight on information technology professionals at all MPL insurance companies. New and unforeseen challenges and pressures for supporting business operations and staff as well as maintaining cybersecurity were added to the ongoing technology tasks, problems, and regulations that IT departments already manage. Bring your questions to this roundtable discussion where you'll be able to share your challenges, successes, and expertise with colleagues. Learn about new and much-needed information and insights from the collective knowledge and experiences of all MPL Association members by engaging with a network of peers for ongoing contact and support.