


**ANNUAL MEETING  
2014 • NEW ORLEANS**  
OCTOBER 28-31  
WHERE IN-HOUSE COUNSEL CONNECT



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Corporate Counsel

# ***Smart Resourcing and Knowledge Sharing with the Sizzle of Social Media***

## **The 2014 ACC Value Champion Series**

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# Re-engineering Legal Support

**Caterpillar Inc.**  
**Byron G. Buck II, Esq.**  
**Senior Corporate Counsel**

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# *Re-engineering Legal Support*

*Byron G. Buck II, Esq.*

*Caterpillar Inc.*



## Byron G. Buck II

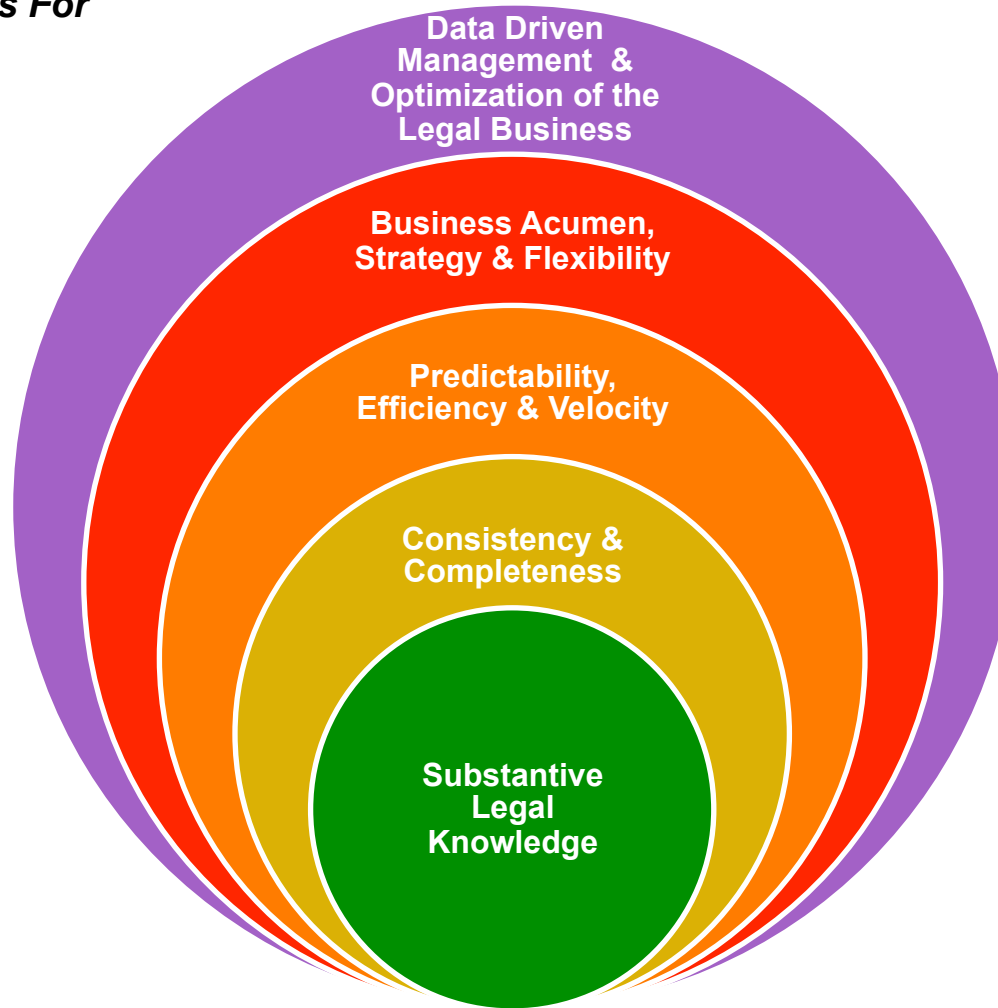
- Senior Corporate Counsel, Caterpillar Inc.
- Manages the Law Practice Management Group
- Practice has included counseling on a broad range of issues generally facing US corporations operating globally
- Over 20 man years of LPO Support in 2013
- B.E.E. Georgia Institute of Technology (1989)
- J.D. South Texas College of Law (1995)
- Registered Professional Engineer, Texas - Inactive





# ROLE OF IN-HOUSE COUNSEL

*Evolving Expectations For  
Success*



*Emphasis On  
Strategy and  
Managing the  
Work*

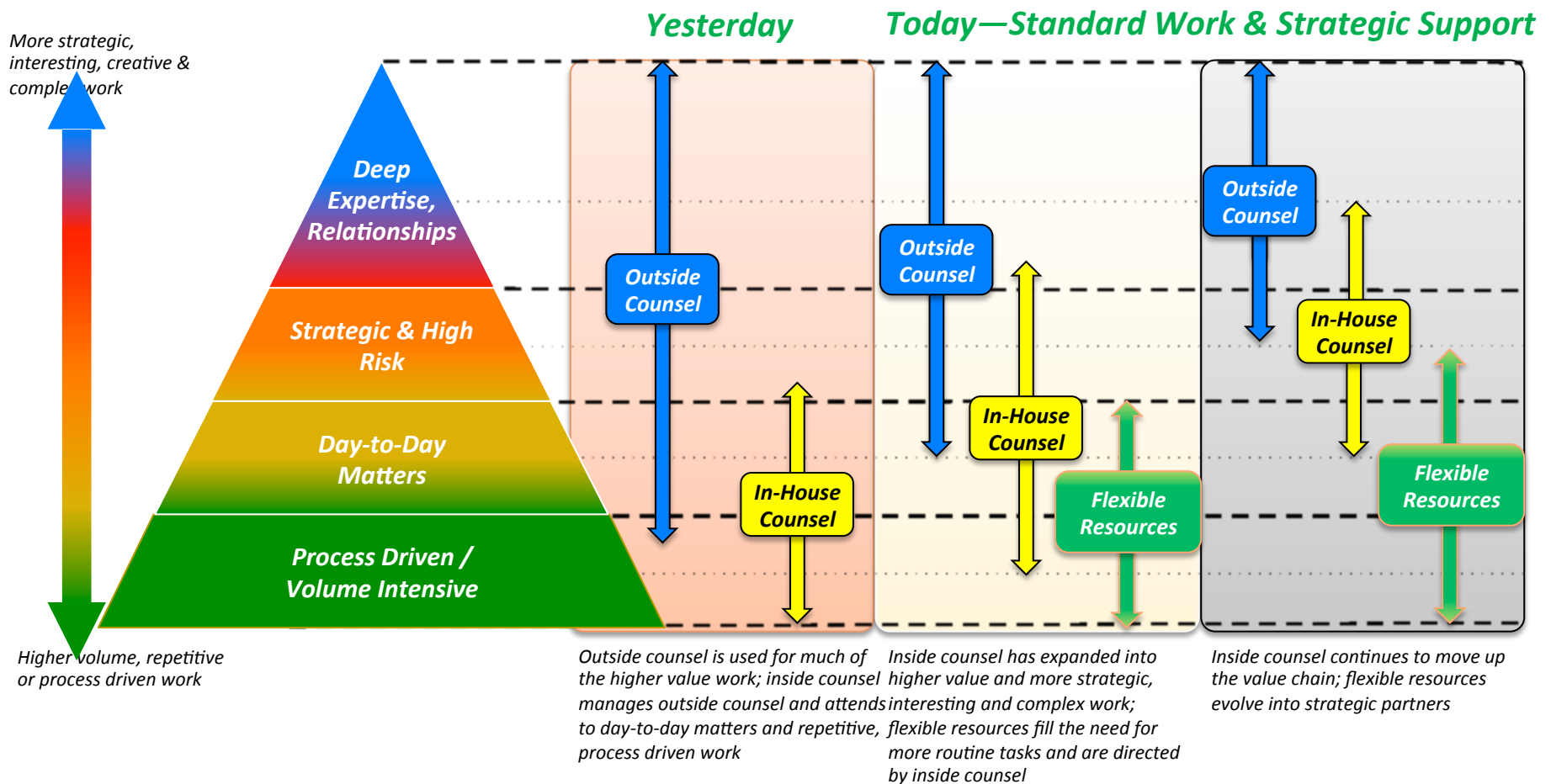


*Emphasis On  
Doing the  
Work*



# ALLOCATING WORK APPROPRIATELY

- As in-house counsel move up the value chain, there is a growing need for intelligent solutions that support them and transform the way lawyers work.





# LITIGATION LANE STRATEGY

Each Lane will provide sustained service levels and drive demand shaping

High volume / less complexity

- Leverage advanced machine learning tools
- Eliminate irrelevant document review
- Quickly identify strategic documents

Lane 1

Days

- Enable knowledge transfer
- Leverage a standardized approach
- Apply consistent techniques across multiple projects

Lane 2

Days/  
Weeks

- Full review by traditional resources
- Many aspects extend beyond a standardized approach and require specialized attention (e.g., unusual documents/media, high profile or dollar exposure, strategic or unique projects, etc.)

Lane 3

Weeks  
(Driven by  
complexity)

Identify Metrics;  
Measure & Track;  
Manage Resources &  
Optimize Processes

Low volume / more complexity

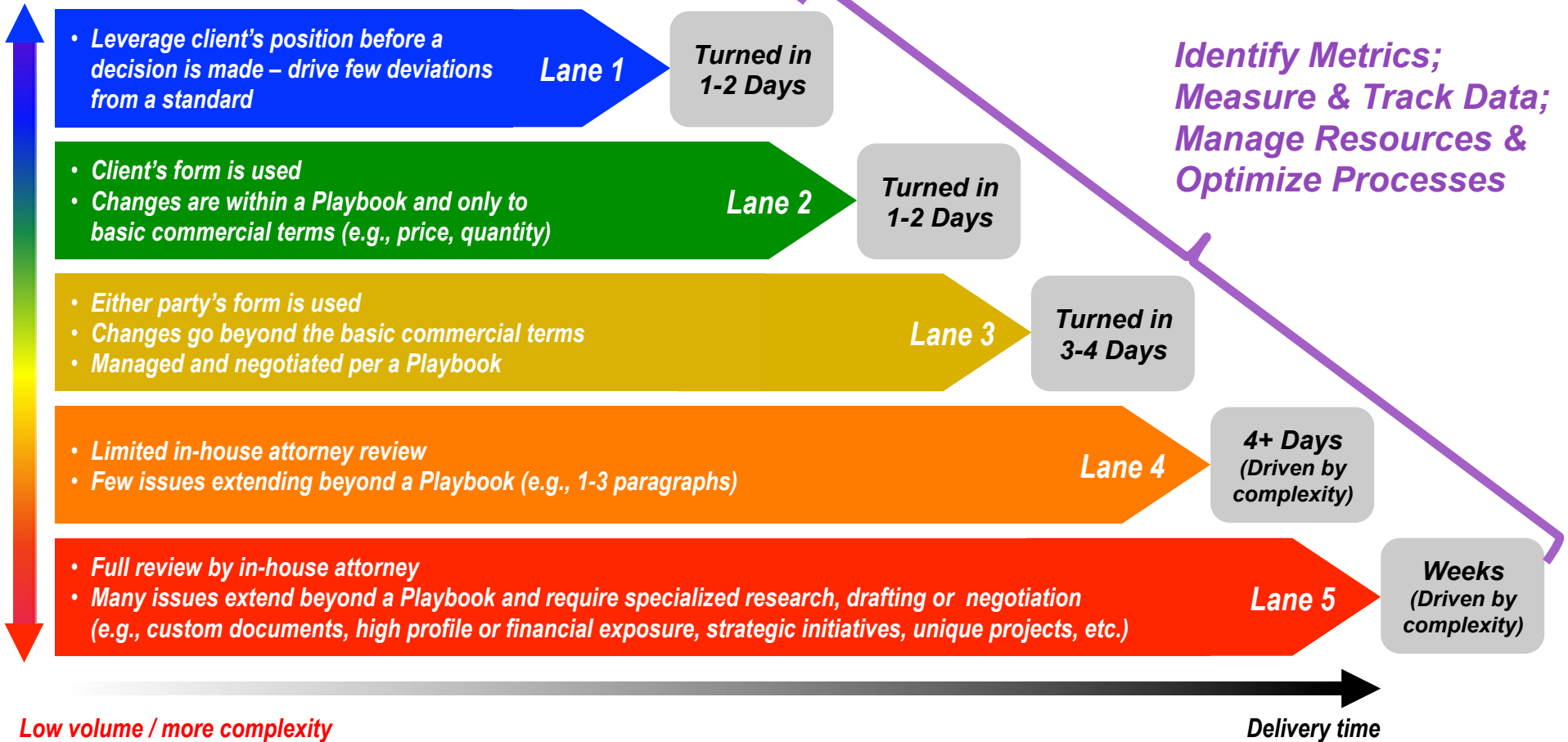
Delivery time



# AGREEMENT LANE STRATEGY

Each Lane will provide sustained service levels and drive demand shaping

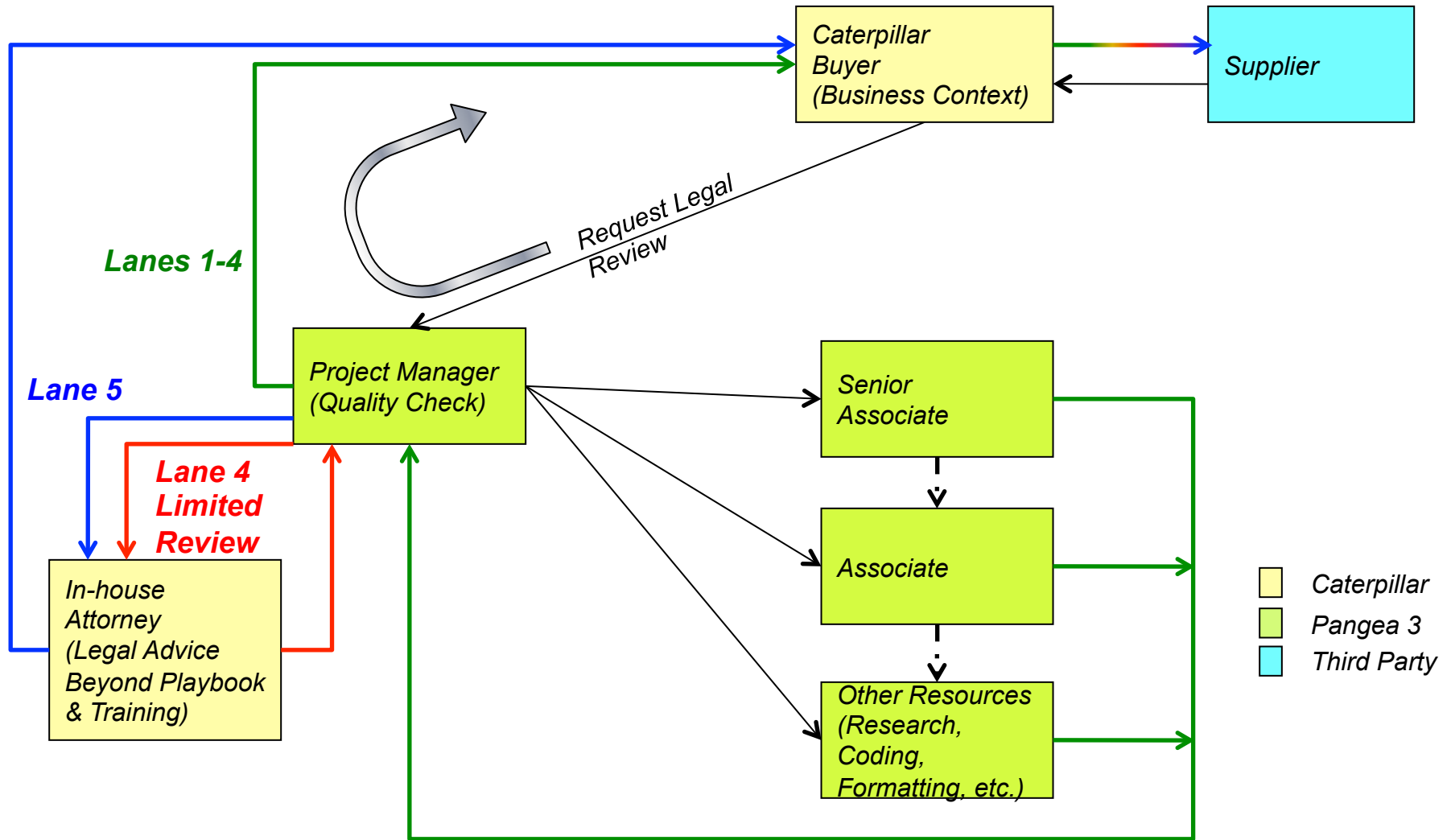
High volume / less complexity



Low volume / more complexity

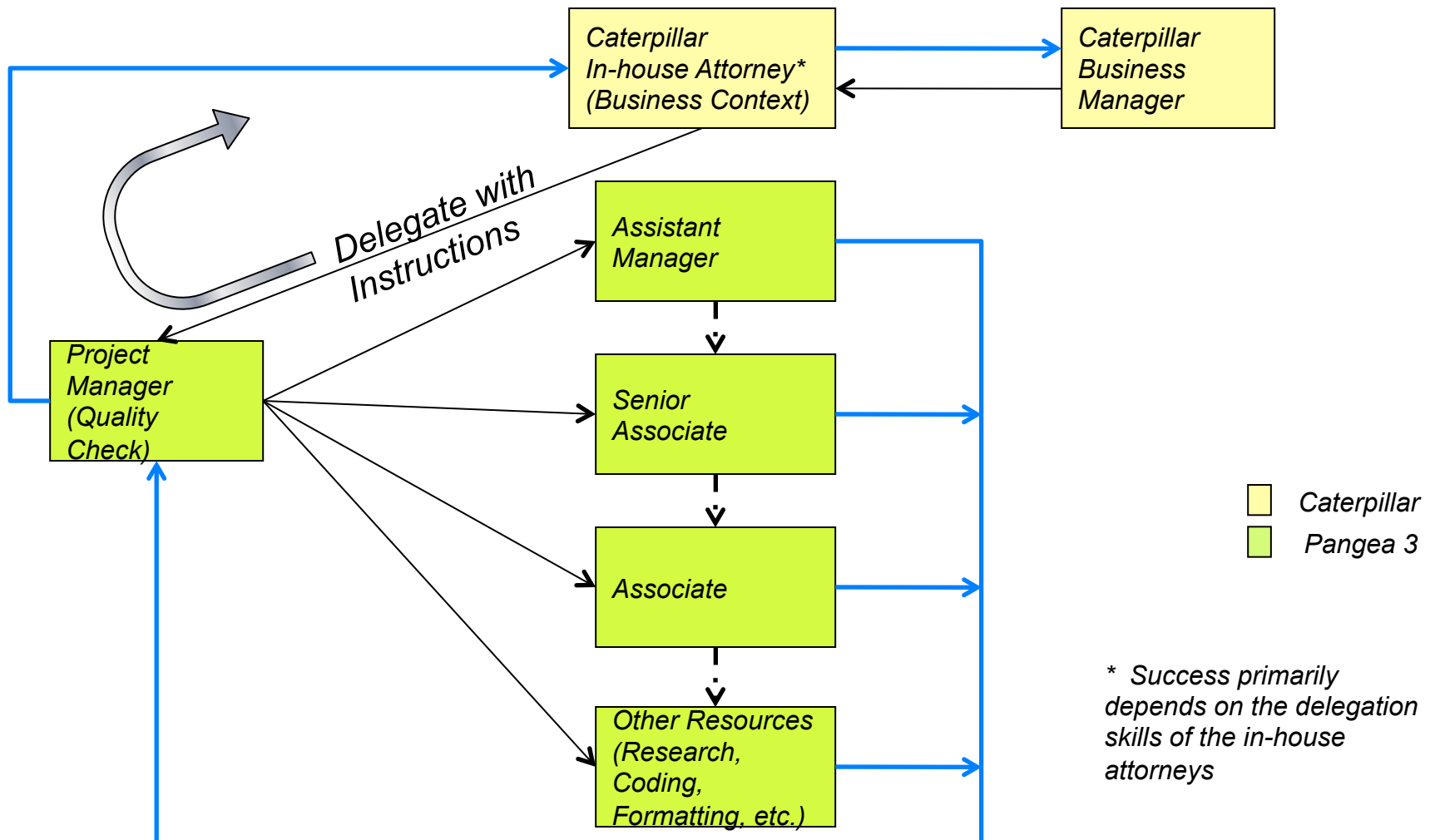


# LANE STRATEGY MODEL (PROCUREMENT)



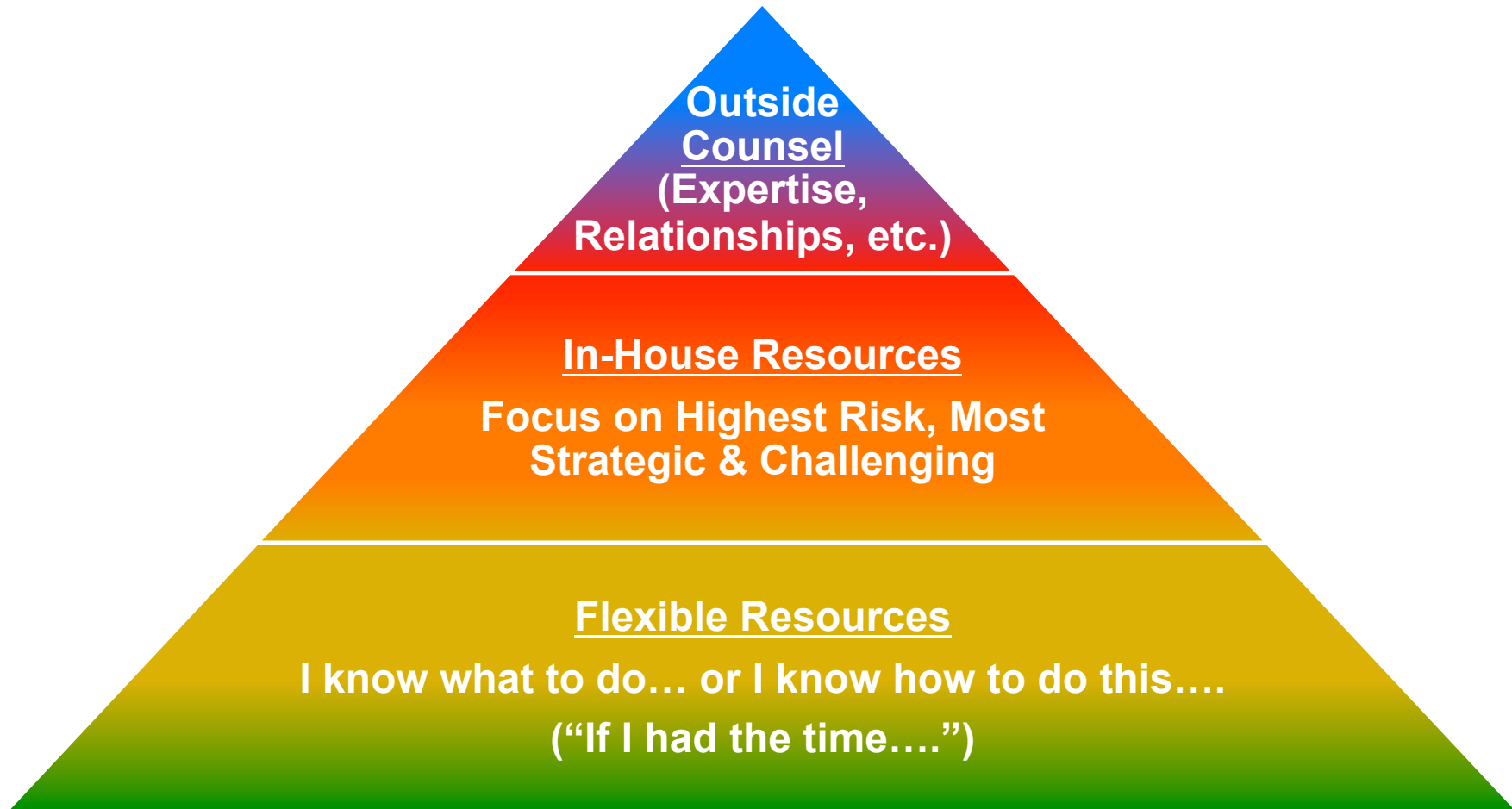


# ATTORNEY DIRECTED WORK MODEL (LOWER VOLUME & ONE-OFF TASKS)





# RUBRIC FOR IDENTIFYING & ALLOCATING WORK







# RESOURCE MATRIX EXAMPLE

		\$\$\$ <----- COST* -----> \$						
Requirement/Characteristic		Outside (Expertise)	In House	Outside (Staff Augmentation)	Contract	In House Agency or Temp	LPO	Interns
1	Deep Expertise	X						
2	Unique relationships or knowledge of the law	X	O					
3	Specialized research, drafting or negotiating	X	X					
4	Custom, creative or complex documents	X	X					
5	High profile issues	O	X					
6	High risk or financial exposure	O	X					
7	Strategic initiatives		X					
8	Requires active legal advice	X	X	X	O	O		
9	Close relationship with business managers		X	O				
10	Strategic knowledge of the business		X					
11	Onsite services are necessary		X	O	X	X		X
12	Would benefit from technology support	O					X	
13	Requires analysis of data or use of analytics						X	O
14	Lower risk				X	X	X	X
15	Uses guidelines, standards, policies or templates				X	X	X	X
16	Has a definable workflow, routine or process						X	
17	Responsiveness is a key driver			O	O	O	X	
18	Volume intensive			O	O	O	X	
19	Is important, but not a core legal task			X	X	X	X	X
20	Sporadic need, flexibility, hour averaging			X	O		O	
21	Short term surge or overflow of work			X	X	X		X
22	Temporary staff replacement			X	X	X		X

*\*Note: Some non-US outside counsel can be cost competitive with LPOs and provide greater flexibility  
Language capability and time zone support has become less of a differentiator*





# Playbook Exemplar

## IX. INDEMNITY

### (§9.1(a) Infringement Indemnity from Licensor (YS))

- *Introduces the issue*
- *Explains the importance and the standard or preferred position*
- *Legal advice provided*
- *Include & exclude terms enable use with other's forms*

Standard Provision (§9.1(a)): Licensor shall indemnify, defend and hold harmless Caterpillar, its affiliates, directors, officers, employees and agents from and against any and all suits, claims, demands, losses, damages, costs and expenses, including without limitation, litigation expenses, attorney's fees and liabilities incurred in connection therewith, arising out of any third party claim as to rights in and to the Licensed Material. Such claims may include, without limitation, claims of infringement of any patent, copyright, or trademark, trade secret misappropriation or unfair competition.

*The standard preferred language for the issue*

Deviation 1: {Include a brief description of the deviation}  
Approval Authority: {Identify the decision maker by title or position}

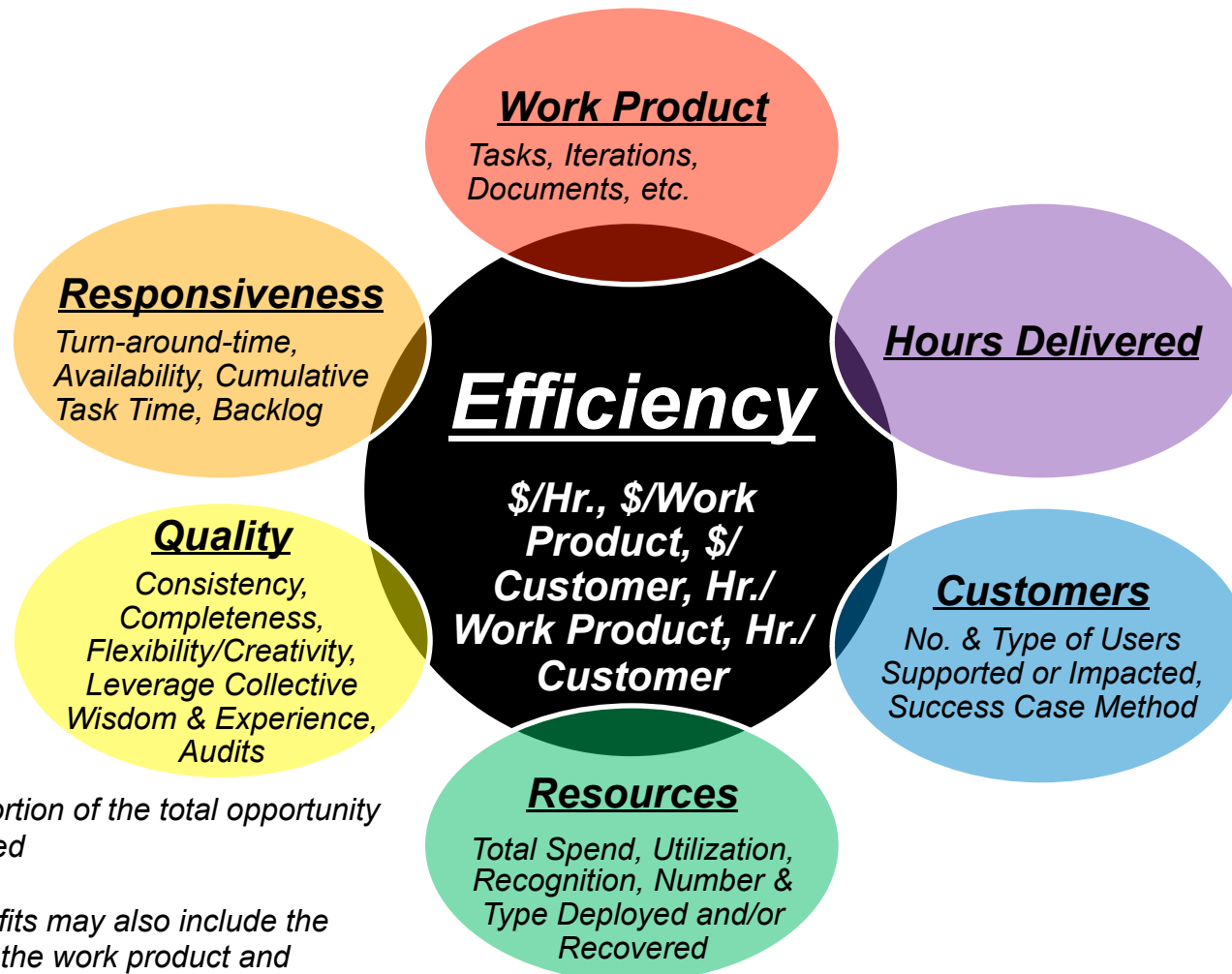
- *Introduces deviations*
- *Approval authority is identified*
- *Explains risk involved with a deviation*
- *Provides help with negotiation strategy*
- *Legal advice provided*

D1. Sample Deviation Provision (§9.1(a)): {Include a brief description of the deviation}  
{Include a cross reference if this deviation impacts other clauses in the document e.g., [Note: If this deviation is approved, then Deviation 1 under §13.1(b) of the Software License Agreement should be considered.]}

- *Deviation text is provided*
- *Cross-references to other text*
- *Differences are highlighted*



# METRICS FOR MANAGING FOR SUCCESS



\* The fractional portion of the total opportunity should be measured

\*\* Additional benefits may also include the financial impact of the work product and avoided costs of hiring.



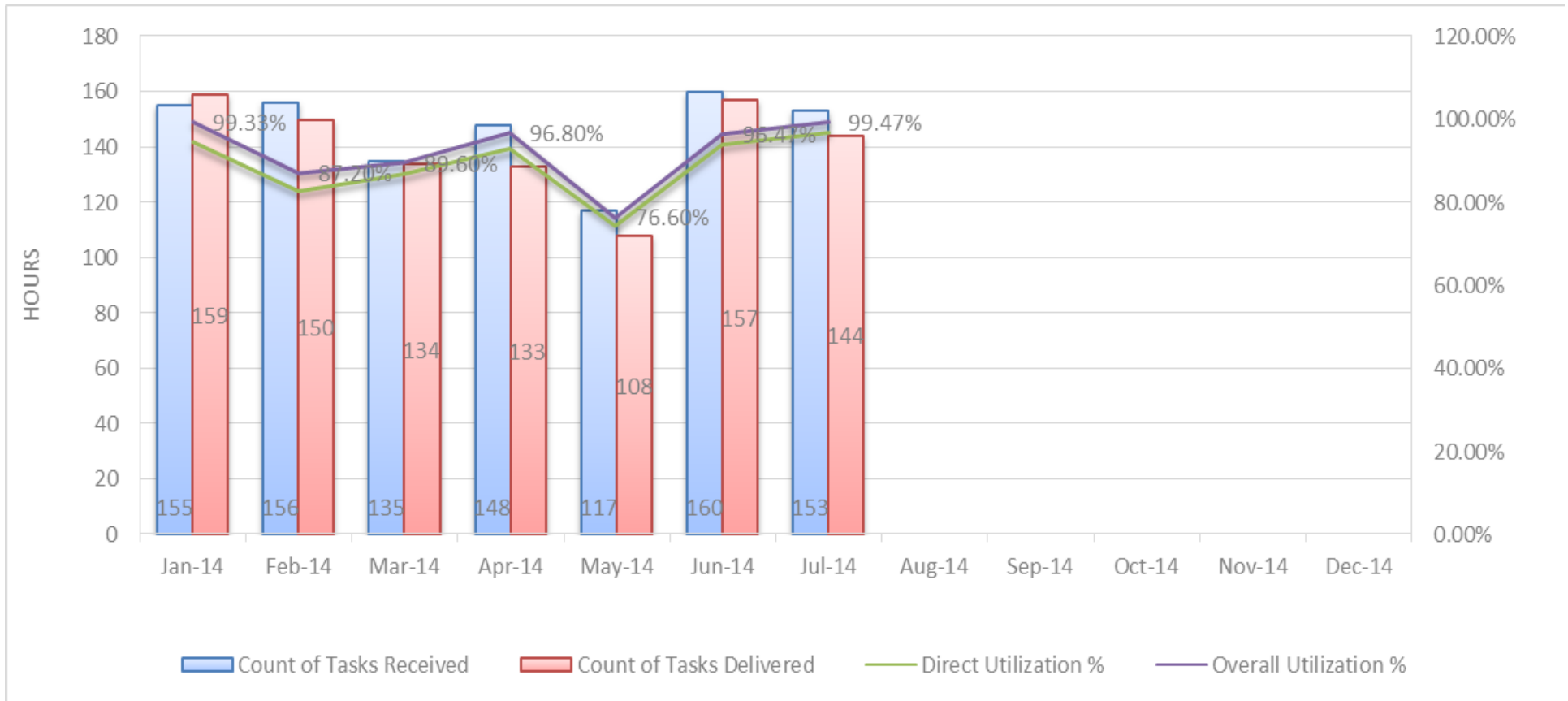
## Average Cost Per Document Examples

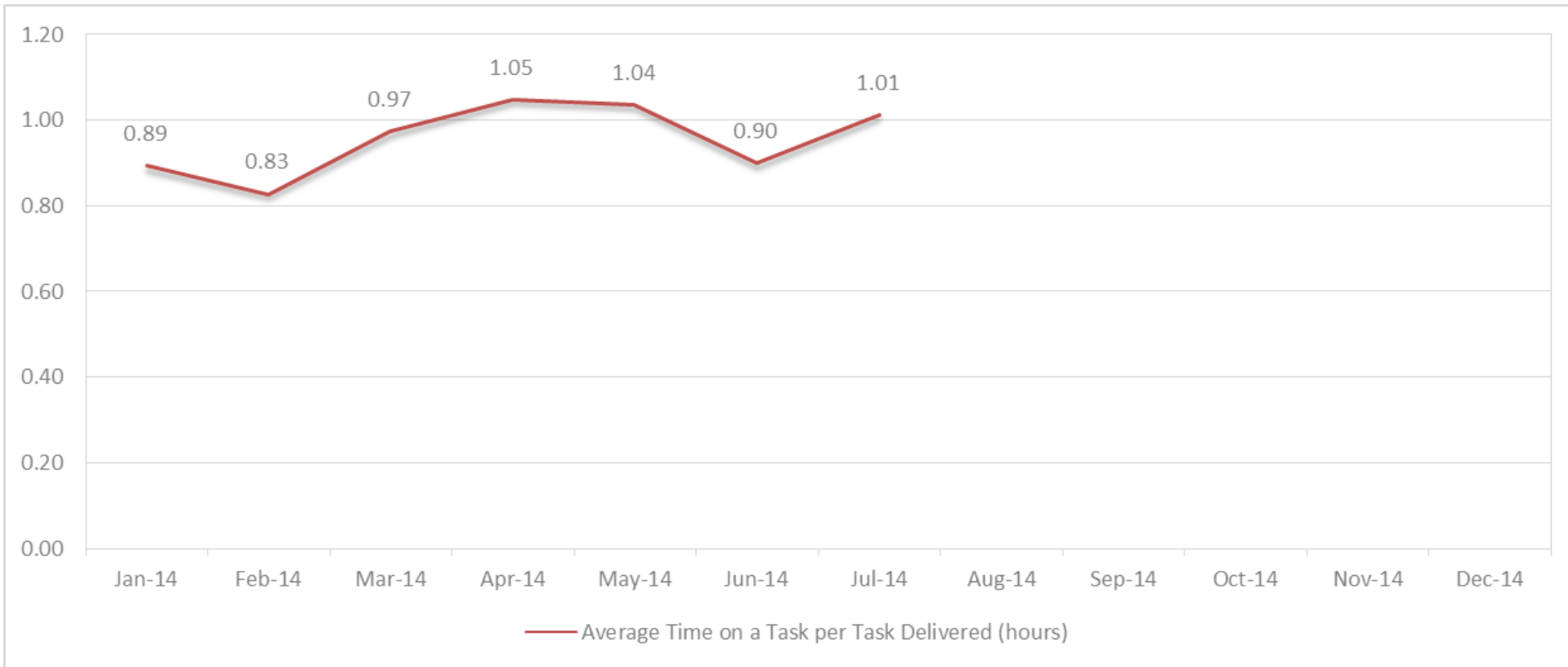
Law Practice Area	Pre-Legal Lane Strategy & LPO Cost	Current Cost Using Legal Lane Strategy & LPO	Percent Cost Reduction
Compliance	\$337.50	\$41.01	88%
Procurement	\$1,860	\$333.58	82%
Services/NDA	\$1,375	\$62.72	95%

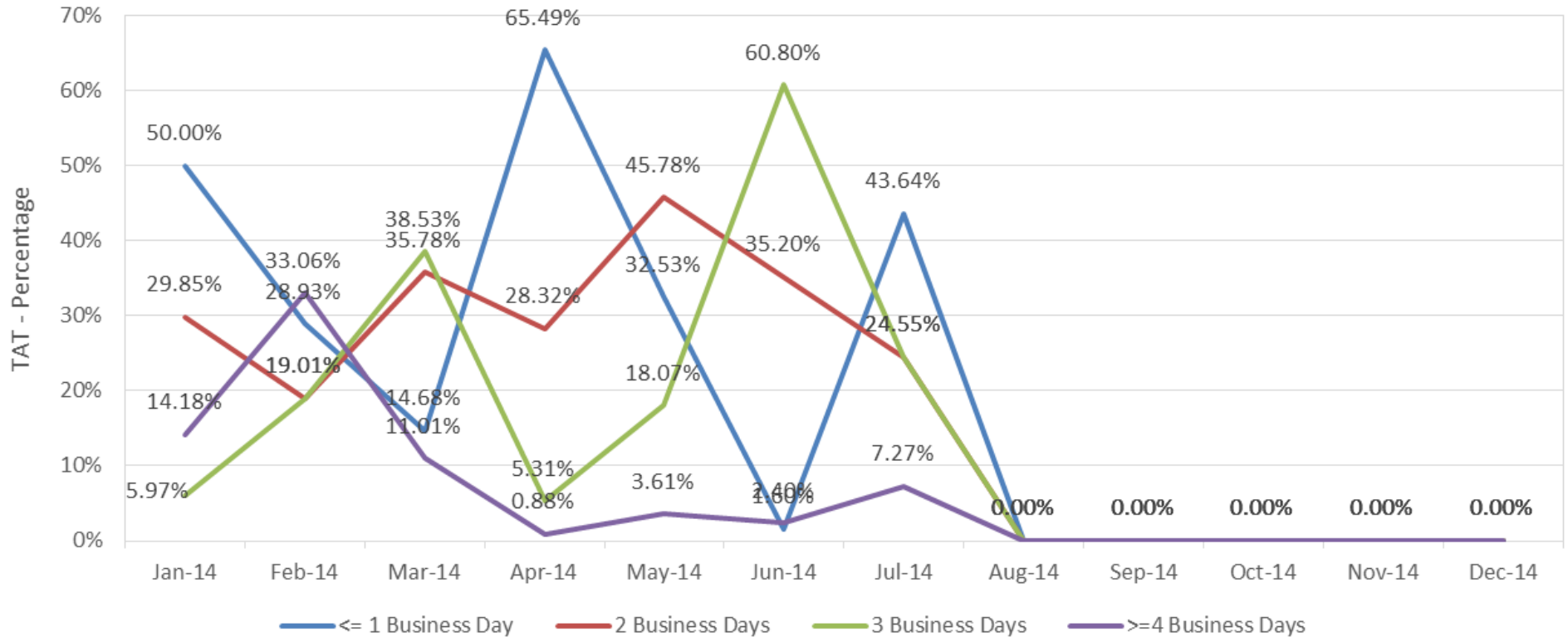
*Note: Initial reviews can be reduced on average to as little as 5% of the original average total document cost and iterations can be reduced on average to as little as 1% of the original average total document cost*

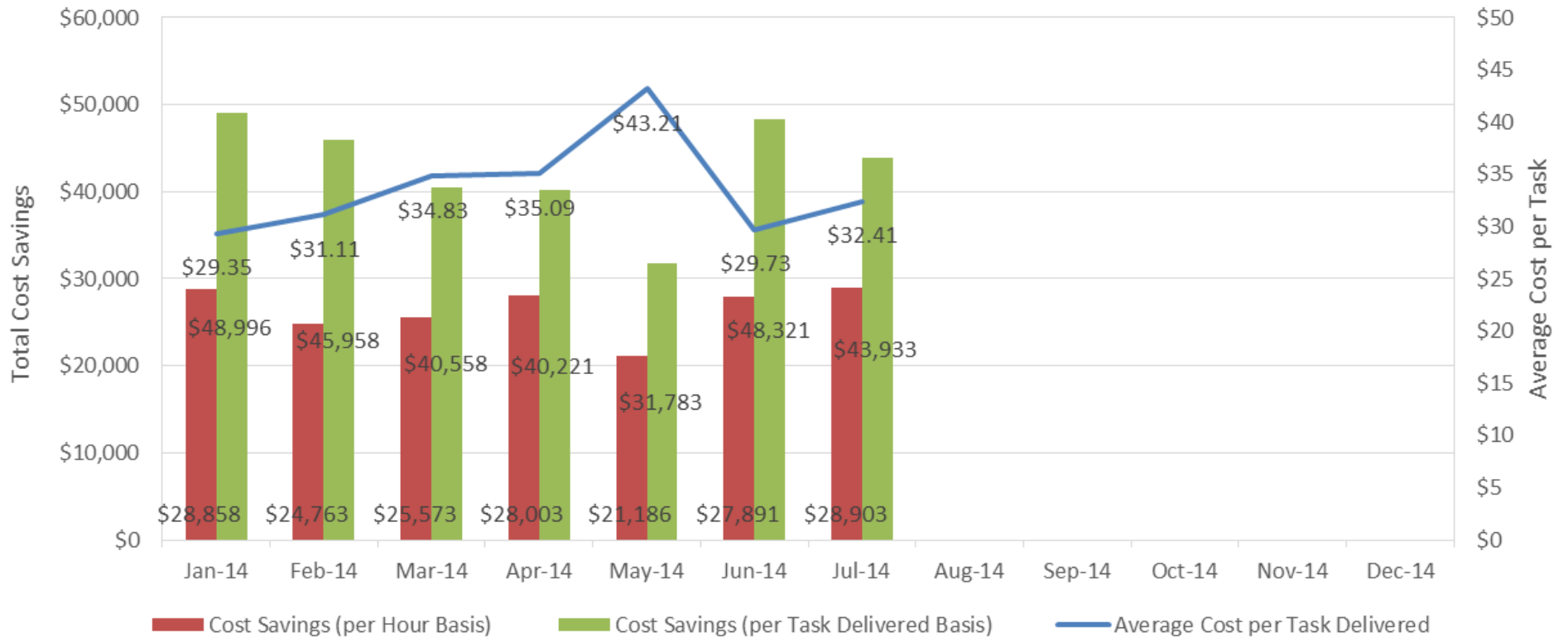
## ***Additional Benefits***

*Greater client satisfaction;  
Improved quality and consistency;  
Broader utilization of flexible resources;  
Concentrated use of meaningful metrics—credibility;  
Improved effectiveness; and  
Higher engagement and autonomy by those performing tasks.*











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Details	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Average
No. FTEs													
No. of LPO Team on 1st of Month	2.00	2.00	2.00	2.00	2.00	2.00	2.00						2.00
Cost of FTEs													
Baseline Normalized Cost Per Task Delivered	\$ 337.50	\$ 337.50	\$ 337.50	\$ 337.50	\$ 337.50	\$ 337.50	\$ 337.50	\$ 337.50					\$ 337.50
Baseline Cost Per Hour	\$ 225.00	\$ 225.00	\$ 225.00	\$ 225.00	\$ 225.00	\$ 225.00	\$ 225.00	\$ 225.00					\$ 225.00
Count of Tasks Received	155.00	156.00	135.00	148.00	117.00	160.00	153.00						146.29
Count of Tasks Reviewed	159.00	150.00	134.00	140.00	108.00	157.00	144.00						141.71
Count of Tasks Delivered	159.00	150.00	134.00	133.00	108.00	157.00	144.00						140.71
Time on Tasks													
Training Time	0.00	6.00	0.00	0.00	0.00	0.00	0.00						0.86
Project Management Time	6.00	0.00	4.00	5.00	3.00	3.00	3.00						3.43
Conference Calls Time	1.00	0.50	0.00	0.75	0.00	0.50	0.50						0.46
Database Management Time	0.00	0.00	0.00	0.00	0.00	0.00	0.00						0.00
Total Time													
Direct Utilization %	94.67%	82.87%	86.93%	92.97%	74.60%	94.13%	97.13%						89.04%
Overall Utilization %	99.33%	87.20%	89.60%	96.80%	76.60%	96.47%	99.47%						92.21%
Average Time on a Task per Task Delivered (hours)	0.89	0.83	0.97	1.05	1.04	0.90	1.01						0.96
Average Cost per Task Delivered	\$ 29.35	\$ 31.11	\$ 34.83	\$ 35.09	\$ 43.21	\$ 29.73	\$ 32.41						\$ 33.68
Cost Savings (per Hour Basis)	\$ 28,858.00	\$ 24,763.00	\$ 25,573.00	\$ 28,003.00	\$ 21,185.50	\$ 27,890.50	\$ 28,903.00						\$ 26,453.71
Cost Savings (per Task Delivered Basis)	\$ 48,995.50	\$ 45,958.00	\$ 40,558.00	\$ 40,220.50	\$ 31,783.00	\$ 48,320.50	\$ 43,933.00						\$ 42,824.07

Calculated Fields

Backlog	2012	2013	2014
Received	154	1,011	1,024
Priority List	114	-	-
Reviewed	134	1,010	992
Delivered	118	1,010	985

TAT (Only for 2013 Data)	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Average
<= 1 Business Day	77	45	26	84	37	12	58						48.43
2 Business Days	50	33	49	42	48	54	37						44.71
3 Business Days	13	28	47	11	20	81	32						33.14
>=4 Business Days	19	40	12	1	3	3	8						12.29
Grand Total	159	150	134	133	108	157	144	0	0	0	0	0	138.57

TAT (Only for 2013 Data)	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Average
<= 1 Business Day	48.43%	30.00%	19.40%	63.16%	34.26%	7.64%	40.28%						34.95%
2 Business Days	31.45%	22.00%	36.57%	31.58%	44.44%	34.39%	25.69%						32.27%
3 Business Days	8.18%	18.67%	35.07%	8.27%	18.52%	51.59%	22.22%						23.92%
>=4 Business Days	11.95%	26.67%	8.96%	0.75%	2.78%	1.91%	5.56%						8.87%





## 10 Steps to Success:

1. Break work into groups based on complexity
2. Devise a workflow to process the work in each group
3. Determine an “As Is” baseline
4. Use “tools” to create standard work
5. Negotiate lower cost structures for incremental resources of varying expertise, flexibility, etc.
6. Allocate tasks to resources having the lowest level of expertise and cost required for the task
7. Manage resources in response to performance feedback using multiple types of metrics
8. Make certain resources know when to ask for help!
9. Implement these principles across jurisdictions and practice areas globally
10. Use change management!



# DO THIS and You WILL

Achieve significant savings and....

- improve customer satisfaction;
- employee engagement;
- quality of work product; and
- timeliness of legal support.



## Important Quick Tips:

- Begin with high volume, repetitive work—  
evolve into lower volume tasks using ADW
- Change management—make certain you  
have management and stakeholder support
- Leverage systems—corporate social media,  
document management, matter management
- Use lower cost resources to build  
the tools!
- **START!!!**

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# Innovation in Talent Development, Deployment and Collaboration

**ACE North America**  
**Kevin Kevin Rampe**  
**General Counsel, North America**



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# ACE NORTH AMERICA OFFICE OF GENERAL COUNSEL BEST IN CLASS – STRATEGY

**KEVIN M. RAMPE**  
GENERAL COUNSEL, NORTH AMERICA

**SMART RESOURCING AND KNOWLEDGE SHARING  
WITH THE SIZZLE OF SOCIAL MEDIA**



insured.™



# ACE Group

— ACE is one of the world's largest multiline property and casualty insurers, providing commercial and personal property and casualty insurance, personal accident and supplemental health insurance, reinsurance and life insurance

— Operations in 54 countries, with more than 20,000 employees serving a diverse group of customers worldwide

## Balance Sheet Strength

- Total capital, which reflects our capacity to take on risk, exceeds \$34.8 billion
- Net loss reserves of \$26.2 billion back our policyholder commitments
- \$12.8 billion paid on claims in 2013
- Book value, or shareholders' equity in the company, is \$28.8 billion and has grown over 100% in the last 5 years
- ACE's debt-to-capital ratio of 16.4% is one of the lowest among major peers
- Total investments of \$60.9 billion are predominantly investment-grade fixed income securities
  - Diversified across geographies, sectors and issuers
  - Average credit rating is A/Aa; average duration is 4 years, which limits interest rate risk

## Disciplined Underwriting Culture

- Our consistent underwriting performance provides stability for customers and shareholders
- ACE has earned a cumulative underwriting profit since its inception in 1985
- Five-year (2009–13) average combined ratio — 91%

## 2013 Year-end Financial Snapshot

US\$ in millions at 12/31/13

Gross premiums written	\$22,828
Net premiums written	17,025
Operating income*	3,217
Net income	3,758
Operating cash flow	4,022

\*Excludes net realized gains (losses)

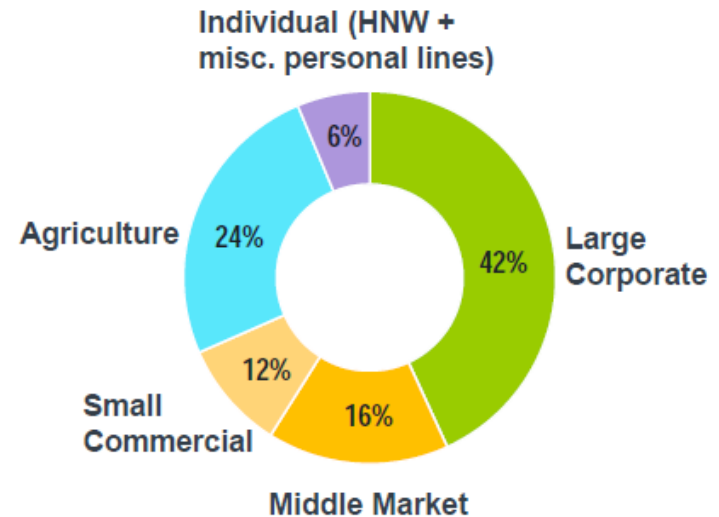
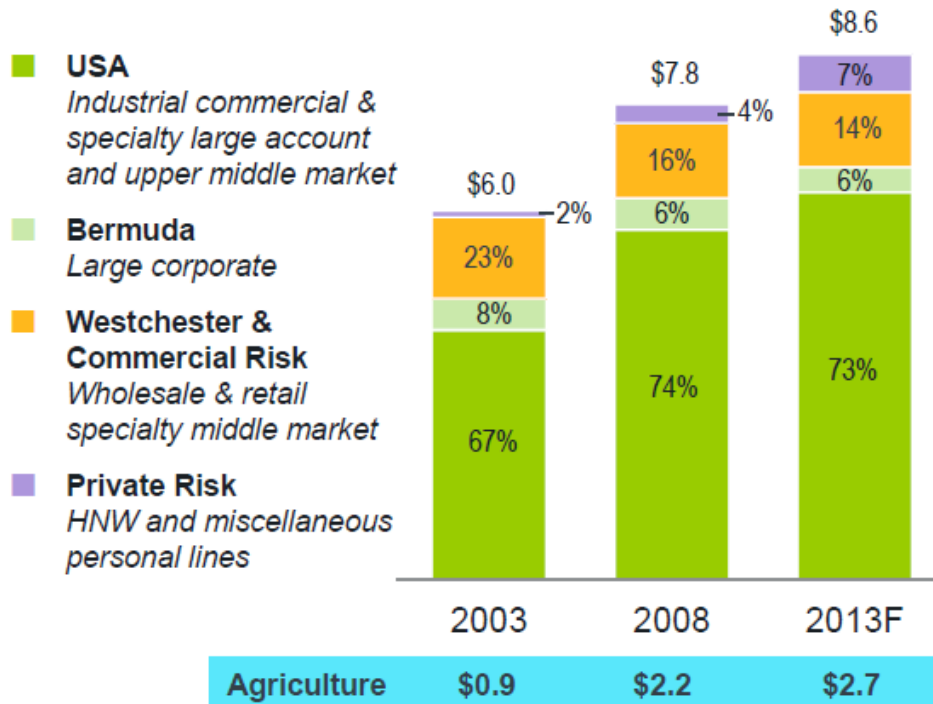


# ACE North America

US\$ in billions

## Retail & Wholesale Commercial & Personal P&C GPW

## 2013F Customer Split (Total P&C)

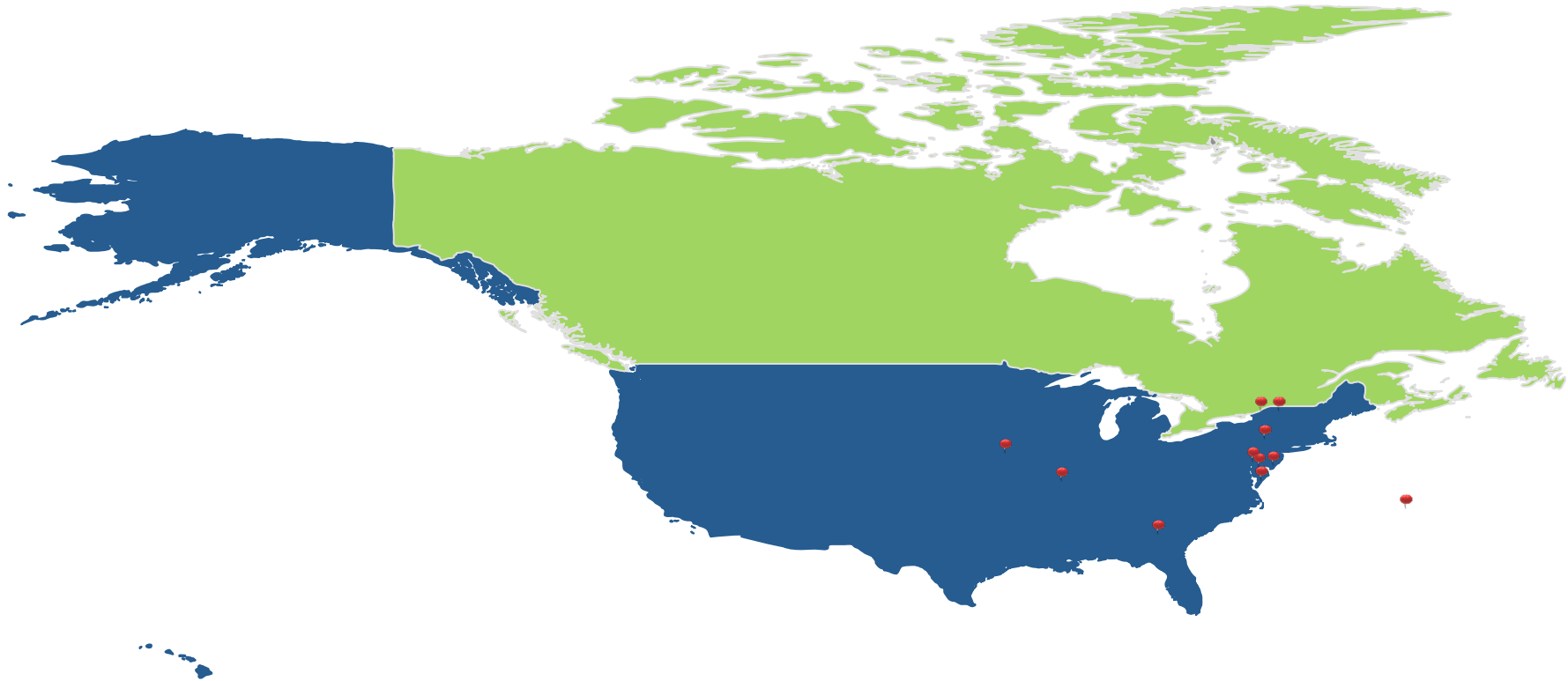






## ACE North America OGC Structure

- 174 people in 11 cities in the United States, Canada, and Bermuda





# Our Challenge

---

- Improve legal service delivery and reduce expenses
- Keeping our legal group connected
- Develop a way to consistently measure trends year over year
- To be a best-in-class organization, dedicated to bringing exceptional value to our clients





## Project BIC (Best In Class)

---

- Change in culture and change in process – created and owned by the members of the OGC
- Legal service coordinator model
- Agile Staffing
- Balanced Scorecard
- Development of a knowledge management platform known as “the link”
  - Platform for collaboration on projects
  - Forums for communication and information exchange
  - Digital Library
  - Comprehensive Search Engine



# Our Structure

- “Legal Services Coordinator” service model
  - Subject matter expertise
  - Business relationship





# Legal Services Coordinators

*North America Office of General Counsel - Legal Services Coordinators*

Business Division	LSC
CRS Legal Services	
CRS (General/issues spanning subdivisions)	Jon Cooperman
CRS – ACE Complete and Workers' Compensation	Ilana Hessing
CRS – Auto	Scott Sanpietro
CRS – Direct Markets	Ron Williams
CRS – D&O	Tom Griggs
CRS – E&O	Carey Merrill
CRS – International Advantage	Patric Jones
CRS – Medical Risk	Patric Jones
CRS - Micro	Jon Cooperman
CRS – Inland Marine	David Tansill
CRS – Property	Erin Ginsberg
CRS – Casualty	Bob Brookes
CRS – Environmental	Bryan Weiss
Combined	
Combined (General/issues spanning subdivisions)	Chad Helin
Combined NA Field Sales	Lori Prince
Combined NA Work Site Marketing	Rich Goodwin
Reinsurance	Deborah Stalker
Global Legal Services	
Global Accident & Health, PBI, Life and Internal Reinsurance	Tara Vrettos
Global P&C Reinsurance (ex. Global A&H and PBI)	Nick Markatos/Claudio Ronzitti
Global Ceded Re (General/issues spanning subdivisions)	Deborah Stalker





# NA Office of General Counsel - Client Site

- OGC Toolbox
  - Playbooks
  - Templates
  - Glossary of Legal Terms
- Client Areas
  - Blogs
  - Documents
- Video's
- Training Materials
- Articles

The screenshot shows the ACE Global Village client site for the NA Office of General Counsel. The page features a navigation bar with categories like News & Global Resources, North America, Europe / Eurasia & Africa, Asia Pacific, Latin America, Japan, and Village Care. The main content area is titled 'ACE NA Office of General Counsel' and includes sections for 'HOW ARE WE DOING?' with a photo of a man, 'CLIENT AREAS' with a list of industry sectors, 'OGC LEGAL TOOLBOX' with links to Playbooks, Templates, and Glossary, 'OGC SPOTLIGHT ARTICLES' with a 'Write a blog post' button, and 'ACC VALUE CHAMPION AWARD' with a '2014' award graphic. On the right side, there are sections for 'OGC MEMBERS' featuring Carrie Davis, 'NOW PLAYING' with a video player for 'It's a Privilege, Your Honor', and 'NA COMPLIANCE' with a mission statement and a link to the site.



# Teamwork

---

- Required element for successful collaboration
- Agile team formation
- Training in improvisational comedy
- Tools
  - Skills Inventory
  - Collaboration Platform







# Skills Inventory Search



## Skills Inventory Search

Explore

- Directory
- Browse Licenses

Create

- Upload a Picture

Modify

- Employee Information
- Edit Your Attorney Licenses

Skills Inventory

- Skills Inventory Data Entry Form

Skills Inventory Search

Site Contents

**Instructions:** Select a Subject Matter Category in the drop down below to find your expert.

Antitrust and Trade Regulation

### Substantial Antitrust and Trade Regulation Experience

**Employee**

- Stuart, Douglas A
- Bernstein, Joy J
- Helin, Chad
- Samers, Audrey

**Position**

- Assistant General Counsel, Corporate Transactions
- Assistant General Counsel
- General Counsel
- Deputy General Counsel

**Department**

- Corporate Transactions/Treasury
- ACE NA Commercial E&O Coverage Litigation
- Combined
- ACE PRS

### Moderate Antitrust and Trade Regulation Experience

**Employee**

- Jackson, Anita L
- Bech, Paul B
- Samers, Audrey
- Meyer, Bradley

**Position**

- Systems Administrator
- Associate General Counsel
- Deputy General Counsel
- Associate General Counsel

**Department**

- OGC Operations and Finance
- ACE NA Commercial E&O Coverage Litigation
- ACE PRS
- Westchester/CRS/Rain and Hail/Penn Millers

### Would Like to Learn About Antitrust and Trade Regulation

**Employee**

- Zacharias, Carol
- Howell, Linda

**Position**

- Deputy General Counsel
- Assistant General Counsel, ESIS

**Department**

- Professional Risk/Canada
- ARM/AFS/Credit Management/ESIS/Foreign Casulty



# Agile Team Platform



Documents

Documentation

Lists

Team Tracking

Sites

TyMetrix Transition

International Policy  
Issuance

Lexis for MS Office

RFI - Online Legal  
Research and  
Information Services

Project BIC - Employee  
Resource Optimization

Project BIC - Link  
Improvements

Project BIC - Improved  
Communication

Discontinuance of RHIC

OGC Matter  
Management - TyMetrix

Collect Signatures and  
Publishing Approval  
Demo

Project BIC 2013  
Committees

Digital Library  
Governance Board

[Digital Library Home](#) > [Agile and Project Teams](#)

## Agile and Project Team Tracking and Collaboration

This site serves as a management tool for OGC agile and project teams. Team membership, scope, and deliverables are tracked in the [team tracking](#) list. Team guidance materials are located in the [documentation library](#). All team collaboration sites in which you are a member appear at the top of the navigation column to the left.

When an agile or project team is formed, the team lead should create a record in the team tracking list. To do this, click on the [Team Tracking](#) list in the navigation column to the left and click the New button. The team tracking form that appears must have all required fields completed prior to saving the form (see below). Certain fields, such as Lessons Learned, will need to be completed by the team lead after the team deliverables have been accomplished and the team debriefs. Throughout the team life cycle, the team status should be updated accordingly.

[Attach File](#) \* indicates a required field

<b>Team Project *</b>	<input type="text"/> The name of the agile or project team project.
<b>Team Type *</b>	Agile Team <input type="button" value="v"/> Agile Teams are typically short in duration with moderately complex tasks. Projects are typically larger in scale with complex tasks.
<b>Team Leader *</b>	<input type="text"/> <input type="button" value="u"/> <input type="button" value="d"/> The project team lead. This may or may not be the Legal Services Coordinator.
<b>Legal Services Coordinator</b>	<input type="text"/> <input type="button" value="u"/> <input type="button" value="d"/> The business unit contact. This may or may not be the project team lead.
<b>OGC Team Members</b>	<input type="text"/> <input type="button" value="u"/> <input type="button" value="d"/> Project members other than the team lead, LSC, or SME.
<b>Outside Specialists</b>	<input type="text"/> Subject matter experts recruited to the project external to OGC and potentially external to ACE.
<b>Project Scope and Deliverables</b>	<div style="border: 1px solid #ccc; padding: 5px;"><p><b>Project Scope and Deliverables</b></p><p></p></div>





# Measurement – Balanced Scorecard Approach

---

- What get's measured gets done!
- Client centric
- Balanced scorecard
  - Must be unique to culture
  - Adaptable and Flexible
- Transparency
- Not a performance evaluation – an improvement tool



# Balanced Scorecard - 2013

Metric	Weight	Score (1-5)	Weighted Score	Targeted Score	How Obtained
<b>Customer Satisfaction</b>					
Overall Satisfaction					Client Survey (annual)
Expertise	6%				"
Business Sense	6%				"
Complex problem solving/Innovation	6%				"
Responsiveness	6%				"
Results	6%				"
Teamwork	6%				"
<b>Financial Performance</b>					
Overall Total Expense (TE) to plan	15%				Financial/Senior Management Review
Travel Expenses to plan	5%				"
Outside Counsel Expense to Plan	5%				"
<b>OGC/BIC Team Initiatives</b>					
Collaborative Platform Participation	5%				SP Stats / Manager Survey
Team Participation	5%				"
Library Participation	5%				"
BIC Project Participation	5%				"
Rules of Engagement	5%				"
<b>Self-Development</b>					
CE Participation and Attendance (Education)	5%				Manager Survey
On the Job Training (Experience)	5%				"
Learns new skills and new areas of ACE (products, businesses, management teams, etc.) (Exposure)	4%				"
<b>Totals:</b>		<b>100%</b>			



## the link – A Unifying Force

---

- Common platform – who we are
- Demonstrated investment in our people
- Must allow room for the social as well as business







# the link

- The Digital Library
- Forum
- Spotlight Articles
- News Center
- Announcements
- Monthly Activity Reports
- OGC Academy
- Mentoring Program
- Skills Inventory
- Department Directory
- Career Training and Development
- Help Center (guidance documents and videos)

ACE Global Village | Compliance | Monthly Activity Reports | Help | Digital Library

SEARCH GOOGLE SEARCH OGC MATERIALS

DIRECTORY LEARNING & DEVELOPMENT SERVICE TOOLS OGC RESOURCES MANAGEMENT TOOLS MYLINK

2014 INITIATIVES

North America Office of General Counsel's 2014 Initiatives

LEARN MORE

2014 Initiatives Digital Library OGC Forum Gateway Welcome to the New Link

**Spotlight**

Project BIC 2014 Update  
Written by Jessica Glick

As a follow-up to the Project BIC 2013 Update in Spotlight, in order to keep everyone informed about the progress of the OGC's BIC committees, the committee heads have shared their most recent

**OGC News Center**

Rep. Peter King: TRIA Renewal Likely to Be at Least 5 Years  
Posted on June 05, 2014

MULTITASK MASTERS  
Posted on June 05, 2014

Canada: OSFI Updates Guidance On Regulatory Compliance Management  
Posted on June 05, 2014

International raid targets data-stealing

**Links**

A Message From Kevin  
OGC Academy  
OGC Career Training & Development  
OGC Mentoring  
Paralegal Research

**OGC Announcements**

Foreign Casualty / Med Risk LSC Changes  
Posted on June 05, 2014





# Digital Library



North America  
Office of General Counsel

Digital Library



The Link



Ask a Librarian



EBSCOhost



Research Tips



Tech Tips



Paralegal Research



Document Spotlight



Feedback



# Sample Library



## Libraries

- Documents
- Environmental Wiki
- Site Pages
- Weiss Personal Storage

## Site Contents

Digital Library Home > Environmental  
Content Moderator: Bryan Weiss

## Documents

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<input checked="" type="checkbox"/>		Name	
		Business Unit Authority Delegations	...
		Competitor Materials	...
		Financial Responsibility	...
		Formal Legal Research Opinions Memos	...
		Greater ACE Pollution Materials and Papers	...
		Legal Research	...
		Manuscript Endorsements	...
		Pollution Articles and Presentations	...
		Reinsurance	...
		Sample Wordings	...
		Template Agreements	...
		Training Materials	...
		Underwriting Guidelines	...

## Contacts

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- Name
  - Weiss, Bryan D
  - Weaver, Rebecca

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- Drive
  - \\uslibapp304\lpadata ...
  - \\ussbyfs808cas\casualtyrisk ...



# Digital Library Search



reinsurance



Everything Conversations Videos

Preference for results in English ▾

## Subject Matter

Audit, Compliance  
Assurance (712)

Manuscript Policies and  
Endorsements (158)

Lexicon (113)

Form 'B' Filings (100)

Reference Materials (69)

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## Document Custodian

Stern, Gregory P (262)

Weiss, Bryan D (227)

Hessing, Ilana G (98)

Callihan, Judith M (86)

Tassoni, Christine (72)

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## Content Type

Document (3,027)

[The Court's divided decision in this case has received wi...](#)  
crucial importance to the insurance and **reinsurance** industries, and the decision will  
have an important impact on the way **reinsurance** is written in New York in the future  
...  
[uslibapp304/lpadata/USF&G redraft.doc](#)

[Proposed Slides - Reinsurance Intermediary Broker.pptx](#)  
1. Owned 99.999999% by ACE Tempest **Reinsurance** Ltd. and 0.000001% by ACE  
Tempest Life **Reinsurance** Ltd ...  
[uslibapp304/.../Proposed Slides - Reinsurance Intermediary Broker.p...](#)

[Index to reinsurance contracts provided to](#)  
A06S – 2001 Aviation XOL Effective 05/01/2001 A07H – 2000 1st thru 4th Prop ... CAT  
XOL Effective 01/01/2001 A09D – 2002 Casualty CAT 1st XOL Effective 08/01/2002  
A06R – 2003 ...  
[uslibapp304/.../Index to reinsurance contracts provided to.doc](#)

[Domicile of](#)  
Bermuda: Class 4 insurance, **reinsurance**, general and long-term; Mexico: **reinsurance**  
ACE Capital Title **Reinsurance** Company 1133 Avenue of the Americas ... See Annex B  
for listing of ...  
[uslibapp304/lpadata/.../Licensing Information 12312007-REV \(3\).doc](#)

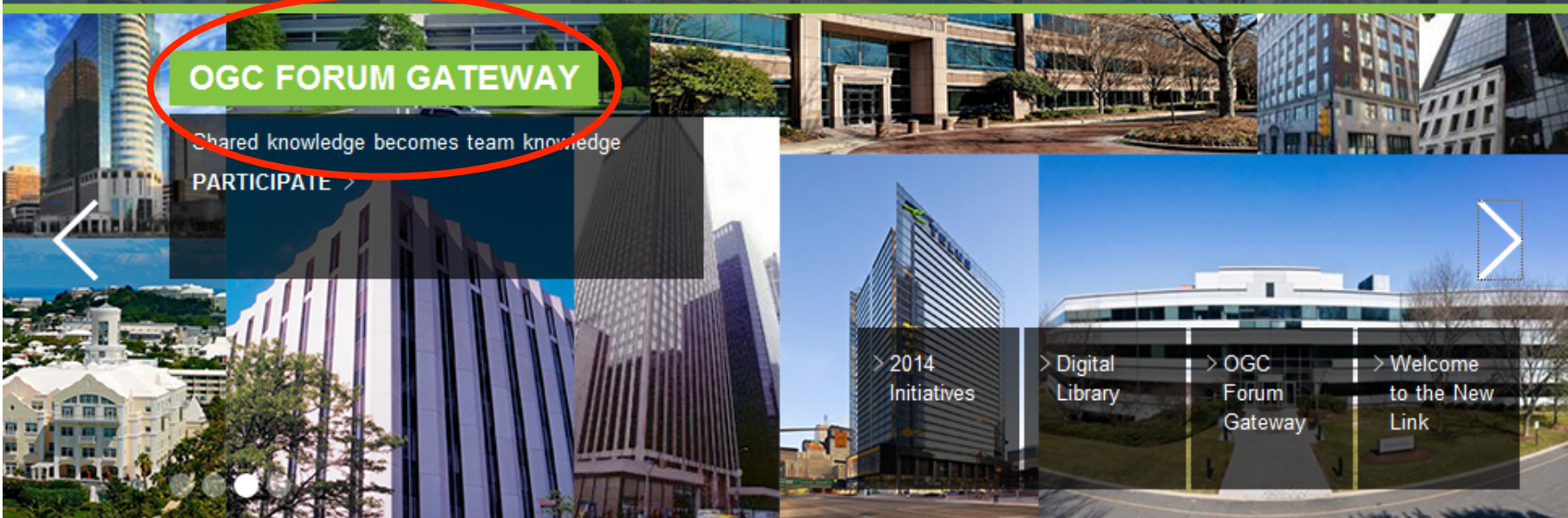
[Guidance Note re the Eurozone Crisis](#)  
and legal uncertainties, with all AEG's **reinsurance** contracts as to the impact of a ...  
New and renewal treaty **reinsurance** contracts- to be managed by AEG **Reinsurance**  
London ...  
[workspace.ace-ina.com/.../Euro Crisis Tool Kit Ceded Reinsurance.do...](#)



SEARCH GOOGLE

SEARCH OGC MATERIALS

- DIRECTORY
- LEARNING & DEVELOPMENT
- SERVICE TOOLS
- OGC RESOURCES
- MANAGEMENT TOOLS
- MYLINK



**Spotlight**

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*Posted on June 09, 2014*

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- Foreign Casualty / Med Risk LSC Changes  
*Posted on June 05, 2014*
- Organizational Change  
*Posted on June 05, 2014*





# OGC Academy

insured.  
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OGC Academy

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## OGC ACADEMY

### What is the OGC Academy?

The OGC Academy was developed for employees new to the OGC and/or new to their role in the OGC. However, the OGC Academy was designed to be customized so that employees, in working with their managers, can have the opportunity to develop the technical and professional skills they need to succeed within the OGC and ACE. The OGC Academy provides both specialized training in the various ACE business areas, and a broad range of corporate training to help OGC employees understand ACE, their careers within the OGC, and the overall insurance industry. The program consists of coordinated classroom training, webinar training, online self-study, on-the-job learning, project work assignments, mentoring and networking. Working with their managers, OGC employees will develop a personalized curriculum to best meet their educational and professional needs.



### How do I participate?

New OGC employees / employees new to OGC roles will automatically be enrolled in the program and will receive input from their manager on the curriculum.

All OGC employees who are interested in registering for courses within the OGC Course Curriculum can register through the ACE Learning Center. Please also feel free to reach out to your managers to have a specific curriculum designed for you with your specific career development goals in mind.

Managers will work with their OGC Academy participants as well as anyone else in their team, to develop a personalized curriculum.




### How do I access OGC Academy Documents?

Click here to access the [OGC Academy - Summary of Tracks \(Legal-Non Legal\)](#)  
 Click here to access the [OGC Academy Course Descriptions](#). [Please click here for printable version](#)  
 Click here to access the [OGC Academy on the ACE Learning Center](#)  
 Click here to access the [OGC Transcript Template](#)  
 Click here for [Instructions on how to record Self-Study Courses in the ACE Learning Center](#)



# Mentoring Program


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## OGC Mentoring Program

Overview
Content
People
Reports
Manage

### WELCOME!

Click [here](#) to access the ACE Mentoring Program website and in the drop-down bar on the right side of the page, select the OGC Mentoring Page.

### OGC MENTORING PROGRAM COMMITTEE CO-CHAIRS

Kimberly Simi

Jessica Glick

### OGC MENTORING PROGRAM COMMITTEE MEMBERS

Lisa Armon

Naime Bourkadi

Rona Hoffman

Cathy Lorenzo

Roger Osgood

Alexandra Rio-O'Donnell

Carmine Giganti

Jessica Glick

Kimberly Simi

### FEATURED MENTORS AND MENTEEES

Thomas Warner

Lisa Armon

Alexandra Rio-O'Donnell

### MISSION STATEMENT

The OGC, N.A. Mentoring Program is an ACE mentoring program designed specifically for OGC personnel, offering a forum for the exchange of professional coaching, career navigation, and/or personal development that helps nurture and advance untapped individual potential benefitting both the OGC Mentoring Program participants and ACE as a whole.

This website serves as the OGC Mentoring Program's information portal for program information and resources for and in support of the Program and its initiatives. We invite and encourage you to browse, utilize and take advantage of content and resources on this site. Any questions or concerns specific to this website can be directed to either [Kimberly Radnor Simi](#) or [Jessica Glick](#). Enjoy, and visit often!

### UPCOMING EVENTS

Content tagged with upcoming events

June 25th - OGC Mentoring Program Mentee Event
by Naime Bourkadi

3 days ago in OGC Mentoring Program

### RECENT TESTIMONIALS

Content tagged with testimonial, testimonials

John Lubensky's Testimonial
by John Lubensky

3 weeks ago in OGC Mentoring Program

Jessica Glick's Testimonial
by Jessica Glick

3 weeks ago in OGC Mentoring Program

Alex Rio-O'Donnell's Testimonial
by Alexandra Rio-O'Donnell

3 weeks ago in OGC Mentoring Program

Kim Radnor Simi's Testimonial
by Kimberly Simi

3 weeks ago in OGC Mentoring Program

Lisa Armon's Testimonial
by Lisa Armon

3 weeks ago in OGC Mentoring Program

### CURRENT INITIATIVES

- Mentee Events Team
- Surveys Team
- Website Content Team

### HELPFUL PLACES

- ACE Mentoring Program
- ACE NA Office of General Counsel
- [OGC Mentoring Program on The Link](#)
- [The Link Gateway Mentoring Resources](#)

### EVENTS

Click [here](#) to view all events

Click [here](#) to add new event

### TESTIMONIALS ACTION CENTER

View all Testimonials

Post your Testimonial

### ACTIONS

- Start a discussion or ask a question
- Write a document
- Upload a file
- Write a blog post
- Create a poll
- Create by email
- Invite people to join this group
- Receive email notifications
- Track in inbox
- Group feeds
- Create an idea





# Career Training and Development


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## ACE Global Village

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### OGC Career Training and Development

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Leave this group

Overview
Content
People
Reports
Manage



North America  
Office of General Counsel

#### OGC DEVELOPMENT FRAMEWORK

- [3 E's Framework Overview](#)
- [OGC Career Competencies](#)
- [OGC PMP Form](#)
- [ACE Employees' PMP Toolkit](#)

#### BROADEN YOUR EXPERIENCE

- [ACE Job Postings in Taleo](#)
- [Combined Ins. Hiring Resource Site](#)
- [OGC Job Opportunities](#)
- [US Recruiting Taleo Toolkit](#)

#### INCREASE YOUR EXPOSURE

- [ACE Women's Forum](#)
- [Combined Insurance Women's Forum](#)
- [OGC Mentoring Program](#)
- [Click Here for Additional Recommended Professional Organizations](#)

#### ENHANCE YOUR EDUCATION

- [ACE Learning Center](#)
- [Learning & Development: ACE University](#)
- [CPCU Society \(Insurance\)](#)
- [Insurance Society of Philadelphia \(Insurance\)](#)
- [New Horizons \(IT\)](#)
- [OGC Advice of Counsel Materials](#)
- [OGC Continuing Education Materials](#)
- [OGC Education Materials](#)
- [Skillpath Seminars \(General Business\)](#)
- [US Educational Assistance](#)

#### OVERVIEW

Welcome to the OGC Career Training and Development Site, dedicated to encouraging OGC employees to explore the 3 E's Development Framework (Education, Exposure, Experience), training opportunities and career development tools as part of their professional growth. All OGC employees are encouraged to consider the ideas and resources on this site as a guide to prepare for career development discussions with their managers.

In the "OGC Development Framework" section you'll find the 3 E's Framework overview information and modified PMP form updated to incorporate the 3 E's in the development objectives section.

Beneath the heading "Enhance Your Education," you'll find links to training offered internally by the ACE Learning Center, ACE University, and by outside vendors (need manager's approval) currently utilized by ACE and which have contracts with ACE.

Under "Increase Your Exposure" you will find information pertaining to development opportunities. The "Broaden Your Experience" section provides links to the recruiting sites and active OGC Internal job opportunities.

In the "Blog" you are encouraged to advertise any training you might be offering, comment upon training and development opportunities you have experienced, or offer suggestions for future training you would like to see. To write a blog, click on "Content" and then "Write a blog post". If you have any questions we invite you to "ask a question" to those who know your field best - your colleagues.

The "OGC Skills Inventory" section provides a link to search for colleagues who have knowledge in specific skill areas and for managers to search for "OGC team members who have an interest in learning a particular skill. There is also a link to update your existing skills which we encourage all OGC members to do as new skills and areas of expertise are developed.

#### LINK TO OGC ACADEMY



#### OGC HIRING PROCESS GUIDELINES

- [OGC Hiring Process Guidelines](#)

#### OGC JOB OPPORTUNITIES

- [OGC Job Opportunities](#)

#### TRAINING EVENTS / SHARE FEEDBACK / SUGGEST TRAINING TOPICS

- [Cyber Risks and Insurance in OGC Career Training and Development](#)

#### QUESTIONS & ANSWERS

- [Start a discussion or ask a question](#) - Brainstorm with co-workers, get your questions answered, build status with your responses.

#### OGC COMMITTEES

- [OGC Advice of Counsel Committee](#)  
List of current OGC Advice of Counsel Committee Members.  
■ [View Now >](#)
- [OGC CE Program Committee](#)  
List of current OGC CE Program Committee Members.

#### VIEW DOCUMENT

Click edit to select a document to display.

