

Don H. Donaldson, RPA, CIC, CRM, CHS-III

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CURRICULUM VITAE

PROFESSIONAL EDUCATION/CERTIFICATIONS

Registered Professional Adjuster (RPA)
Certified Insurance Counselor (CIC)
Certified Risk Manager (CRM)
Certification in Homeland Security Level III (CHS-III)

MEMBERSHIP/AFFILIATIONS

Society of Certified Risk Managers Curriculum Advisory Committee &
National Faculty Member
Society of Certified Insurance Counselors Faculty Member
Society of Insurance Research Fellow
Society of Insurance Trainers and Educators
Society of Registered Professional Adjusters
American College of Forensic Examiners International
International Litigation Management Association
National Association of Insurance Litigation Managers
Academy of Producer Studies -Fellow
Institute for Business and Home Safety Associate
Texas Claims Association
Dallas, Texas; East Texas; and South Plains Claims Associations
Who's Who in Insurance & Risk Management

Former Membership/Affiliations

Houston Claims Managers Council
Dallas/Ft. Worth Claims Managers Council
Servicing Carrier Audit Committee-A.I.P.S.O.
Claims Review Committee-Texas Medical Liability
Association-JUA
CPCU Dallas/Ft. Worth Chapter - Educational Consultant
North Lake College-Faculty Member
El Centro College-Faculty Member

LICENSES

TX Adjuster- All Lines
TX Risk Manager P/C-Type 18-00
TX Permanent Recording Agent
OK Adjuster-Bonds, Prop, Fire, Marine, Casualty,
Surety, & Vehicle; W/C
FL Adjuster-All Lines

PROFESSIONAL POSITIONS

- 08/89 **LA SUPPORT GROUP, INC. - MONTGOMERY, TEXAS**
to **Title/Duties:** President & Chief Executive Officer.
Present Responsible for the creation and management of all operational units in group providing technical, management, and consulting services to the insurance, legal, and self-insured community in the areas of pre/post loss risk management, product development, claims administration, training, auditing, and automated resources.
- 06/82 **CRUM & FORSTER COMMERCIAL INSURANCE - DALLAS, TEXAS**
to **Title/Duties:** Regional Commercial Claims Manager
08/89 Responsible for twenty eight (28+) management, supervisory and technical staff plus the dedicated administrative and support staff. Regional authority for the disposition of all liability exposures, including Excess, Umbrella and Bonds, for an area including North Texas, OK, LA, and AR. Servicing Carrier responsibilities for CAIP programs in LA, OK, and AR as well as the statewide Texas TMLA-JUA. Oversight of all Fidelity & Surety losses and responsibility for litigation in all first and third party product lines. Headed product development team for E&S and non-admitted product deployment. Responsible for exclusive control of the selection, approval and monitoring of 35 panel law firms as well as preparation and management of an annual \$9.2 million allocated expense budget. Oversight and management of all Branch Claims operations in LA, OK, AR and North TX.
- CRUM & FORSTER COMMERCIAL INSURANCE - HOUSTON, TEXAS**
Title/Duties: Branch Claims Manager
Responsible for a staff of thirty-six (36) who handled all claims for the Houston Branch. Oversight and management of Beaumont Claims Service Office. July, 1986 promoted to Regional Claims Manager.

Professional History Continued:

CFCI Houston, TX (Cont.)

Title/Duties: Assistant Branch Claims Manager

Responsible for assisting in all of the above described duties. Promoted to Branch Claims Manager.

Title/Duties: Unit Supervisor

Exclusive authority for auto, general liability, professional liability, umbrella and bond (F&S) claims. Supervisory duties included five (5) local claims technicians and four (4) claims technicians in the Beaumont Service Office. Promoted to Assistant Branch Claims Manager.

Title/Duties: Litigation Specialist

Responsible for 225 litigated claims covering all aspects of liability coverages included negotiating with law firms regarding case management, billing rates, etc. Promoted to Unit Supervisor in December of 1983.

05/81 **HORACE MANN INSURANCE COMPANY - HOUSTON, TEXAS**

to **Title/Duties:** Senior Claims Representative

06/82 Responsible for professional liability and personal lines claims for the states of Texas, Oklahoma, New Mexico and Louisiana. This company, a subsidiary of INA, specialized in insurance coverage for teachers and school districts. Supervised the handling of professional liability, school board E&O liability, corporeal punishment, group/individual L&H, and personal lines claims.

05/79 **CUSTARD INSURANCE ADJUSTERS, INC. - DALLAS, TEXAS**

to **Title/Duties:** Outside Adjuster

05/81 Began with outside investigations on auto, general liability, and property claims. Eventually specialized in long haul trucking cases, products liability, large commercial property cases and on-the-scene investigations of same.

05/77 **GAMA MANAGING GENERAL AGENCY - GARLAND, TEXAS**

to **Title/Duties:** Agency Partner and co-founder

05/79 Established and operated a Property/Casualty Insurance MGA with full contractual responsibility for all claims arising on produced business in property and selected authority in casualty claims. Sold to partner in 1979 to pursue full time claims career.

PUBLICATIONS

- Donaldson, D. H. (2008) Reducing claim costs via prompt reporting.
Mini Claim Audits Net Big Savings, ROUGH NOTES, February 2008 (pp. 122-123).
- Donaldson, D. H. (2007) Risk Manager's role in claims auditing.
Risk Managers Should Get On Board With Independent Auditing of Claims, NATIONAL UNDERWRITER, November 19, 2007 (pp.34-35).
- Donaldson, D. H. (2004) Crisis Management and the Emergency Operations Plan.
Dealing with Emergencies, ROUGH NOTES, December 2004 (pp. 16-17).
- Donaldson, D. H. (2003) Effective First and Third Party Loss Management.
Communication in the Real World, ROUGH NOTES, July 2003 (pp. 78-79).
- Donaldson, D. H. (2003) Mitigating Loss Through Effective Communication.
Risk Control –Communication is the Key, ROUGH NOTES, June 2003 (pp. 60-62).
- Donaldson, D. H. (1998) Factors Influencing Customer Loyalty and Retention.
The Role of the Claims Department, THE INSURANCE RECORD, December 17, 1998.
- Donaldson, D. H. (1998) Best Practice considerations for inside adjusting units.
Lost Contact, CLAIMS Magazine, November 1998 (pp. 74-78).
- Donaldson, D. H. (1996) Developing negotiation skills and techniques.
The Art of the Deal, The CITATION, November/December 1996 (pp.12-14).
- Donaldson, D. H. (1994) Dealing with well known members of the Plaintiff's Bar.
The Colorful Story Theory, The CITATION, November/December 1994 (p. 18).
- Donaldson, D. H. (1994) Suit Committee concept and application.
Old Ideas Take New Form, The CITATION, July/August 1994 (p.13).
- Donaldson, D. H. (1992) Advanced casualty claims handling. Course guide and text.
Advanced Claims Handling, North Lake College.
- Donaldson, D. H. (1991) Litigation control techniques & cost control measures.
Course guide and text. ***Litigation Management***, North Lake College.
- Donaldson, D. H. (1990) Bad faith in claims handling. Course guide and text.
Bad Faith Claims, North Lake College.

Publications Continued:

Donaldson, D. H. (1989) Consumer protection issues in first and third party claims. *Consumer Protection I*, El Centro College.

Donaldson, D. H. (1986) Considerations in Agent's Errors and Omissions claims. *Agent's E & O*, Producers Council Quarterly, Vol. 4, 2nd Qtr 1986 (pp. 8-13).

PRESENTATIONS

Donaldson, D. H., Emergency Management and Crisis Mitigation, MEGA Graduate Seminar, National Alliance For Insurance Education, Orlando, FL 2008.

Donaldson, D.H., Coordinating Contractual Risk Transfer with Additional Insured Status, National Convention, National Alliance For Insurance Education, Denver, CO 2006.

Donaldson, D.H., Emerging Exposures in Adjuster Errors & Omissions, Annual Conference, Workers Compensation Claims Professionals of America, Naples, FL 2005.

Donaldson, D.H., Factors Influencing Positive Outcomes in Claims Management. National Conference, Association of Property & Casualty Claims Professionals, South Seas Resort, FL 2004.

Donaldson, D.H., Navigating Civil Litigation Involving Concurrent Criminal Prosecution. June Meeting, Trial and Insurance Practice Section (TIPS) Dallas Bar Association, Dallas, TX 2003.

Donaldson, D. H., The Impact of Terrorism and Other Factors on Insurance. Annual Conference, Workers Compensation Claims Professionals of America, Captiva Island, FL 2003.

Donaldson, D.H., The Selection, Management and Utilization of Legal Counsel. MEGA Conference, Society of Certified Insurance Counselors, Denver, CO 2003.

Donaldson, D. H., The Claims Component of Post Loss Mitigation & Risk Control. National Institute, Certified Risk Managers International, Chicago, IL 2002.

Donaldson, D. H., Control of Risk Evaluating Unbundled Claim Services and TPA Vendors. National Institute, Certified Risk Managers International, Seattle, WA 2001.

Presentations Continued:

Donaldson, D. H., Variations in the Claims Management Process for Risk Managers. National Institute, Certified Risk Managers International, Dallas, TX 2001.

Donaldson, D. H., Risk Control Domestic & International Claims Administration. National Institute, Certified Risk Managers International, Kissimmee, FL 2000.

Donaldson, D. H., Risk Control Fundamentals of Risk Control in Pre and Post Loss Environments. National Institute, Certified Risk Managers International, Chicago, IL 2000.

Donaldson, D. H., Risk Financing Quantitative Analysis & Full Transfer Options. National Institute, Certified Risk Managers International, Los Angeles, CA. 1999.

Donaldson, D. H., Real World Implications of Y2K in First & Third Party Claims. Annual Conference, Texas Independent Insurance Adjusters Association, Dallas, TX. 1998.

Donaldson, D. H., Ethical Insurance Practices The Rising Tide. Annual Conference, Texas Independent Insurance Adjusters Association, Dallas, TX. 1996.

Donaldson, D. H., Automated Resources -- Business & Insurance Applications. March Luncheon Meeting, Dallas Claims Association, Dallas, TX. 1996.

Donaldson, D. H., Administering Employee Benefit Plan Claims. Emerging Markets Seminar, Texas Managing General Agents Association, Corpus Christi, TX. 1994.

Donaldson, D. H., Modern Claims Handling Techniques & Fraud Detection. Annual Claims Conference, Dallas Claims Association, Dallas, TX. 1992

Donaldson, D. H., Technology & Claims Investigation Techniques. Summer Claims Conference, South Plains Claims Association, Lubbock, TX, 1992.

Donaldson, D. H., Pre-Employment Screening & Workers Compensation. Houston Chamber of Commerce, April, 1992.

Donaldson, D. H., Litigation management and selection of Defense Counsel. Annual Claims Conference, TU Electric, Trinidad, TX, 1991.

Donaldson, D. H., Legal Issues & Insurance Professionals. Annual Claims Managers Symposium, North Lake College, Dallas, TX, 1991.