

CAJPA 2017 SESSIONS

WEDNESDAY September 13, 2017

11:00 am – 12:15 pm



Suicide & Bullying: How Schools Can Reduce Risk & Improve Results

Location: Emerald/Nevada, Lake Tahoe Resort

Learn about effective ways of reducing risks and improving school climate; different forms of student physical, social and emotional abuses that can lead to suicidal contemplation, and the various approaches to countering their impact.

At the completion of this session, attendees will be able to:

- Identify the different forms of student aggression
- Understand the costs and consequences of bullying / cyber-bullying, including suicide
- Learn the most effective ways to improve the overall school climate to decrease risk and liability

Speaker:

Rick Phillips, Executive Director, Community Matters

Moderator: TBD

Interest areas: Loss Control, Liability

National Trends & Emerging Claims Issues

Location: Blaisdel/Stanford, Lake Tahoe Resort

An overview and analysis of the latest and most compelling claim issues and emerging trends impacting public entities. The session will look at current developments in public sector verdicts and settlements and focus on big exposures and where we see both favorable and adverse trends developing.

At the completion of this session, attendees will be able to:

- Increase awareness and appreciation of the most significant exposures facing public entities.
- Understand how California jurisdictions stack up against the nation in terms of verdict and settlement trends.
- Identify emerging claim exposure and their potential impact.

Speakers:

Wayne Falsetto, CPCU, Vice President Claims Division, Munich Re America, Inc.

Charles Kroh, Senior Vice President, Head of Specialty Markets Claims, Munich Reinsurance America, Inc.

Moderator: TBD

Interest areas: JPA Board, Pool Manager, General Interest, Loss Control & Liability.

Funding Your Pool for the Long-Term: Efficient Management of Pool Capital

Locations: Tallac, Lake Tahoe Resort

Pools were initially formed as a temporary solution for an insurance crisis. Over time, public agencies have seen the benefits of pooling and now risk sharing pools are a more permanent financial structure. Public agencies across the country rely on pools for their insurance needs. The evolution of funding and the pool/member relationship will be addressed.

At the completion of this session, attendees will be able to:

- Have a better idea of what questions to ask
- Know the long-term policies and practices for funding of pools
- Understand how Solvency II standards were developed and how they may apply to a pool

Speaker:

Kevin Wick FCAS, MAAA, (US - Assurance) PwC

Moderator: TBD

Interest areas: Finance, JPA Board, Pool Manager

Designing the Perfect Defense to a Dangerous Condition

Location: South Shore Room, Harrahs

Several examples of lawsuits alleging dangerous condition of public property will be shared as well as how the public entity strategically managed these claims from the initial investigation, claim response, lawsuit, responsive pleadings, discovery, depositions, dispositive motions, and trial. By exploring specific examples of alleged dangerous conditions the panel will discuss best practices on how to manage these claims and take steps to avoid liability.

At the completion of this session, attendees will be able to:

- Gain an understanding of the tort claims process on dangerous condition claims
- Develop some best practices for investigating dangerous condition claims and preserving evidence
- Learn strategies for litigating dangerous condition claims

Speakers:

Christie Bodnar Swiss, Esq., Partner; Collins Collins Muir + Stewart LLP

Michael L. Wroniak, Esq., Partner; Collins Collins Muir + Stewart LLP

Moderator: TBD

Interest areas: JPA Board, Pool Manager, General Interest, Loss Control and Property & Liability.

Adapting to Weed in the Workplace

Location: Flying Cloud, Lake Tahoe Resort

With the passage of Proposition 64, California joins a number of states in legalizing recreational marijuana. How does this impact the workplace? In this session, understand the state of the law with respect to the use of recreational and medical marijuana, learn the parameters of such use in the workplace, and consider the implications for employer liability.

At the completion of this session, attendees will be able to:

- Understand legal marijuana and an employers' right to discipline and test
- Understand interaction of disability discrimination law with marijuana use
- Identify possible new exposures to agencies and potential JPA adaptations in response

Speakers:

Kristine E. Kwong, Partner, Musick, Peeler & Garrett LLP

Douglas R. Alliston, Shareholder, Murphy Campbell Alliston & Quinn

Moderator: Nidra Kumaradas, ASCIP

Interest areas: Human Resources, JPA Board, Pool Manager

2:15 pm – 3:30 pm

How to Sabotage Your Claims Without Really Trying: Remaining Involved in your Claims for a Successful Outcome

Location: Emerald/Nevada, Lake Tahoe Resort

Workers' compensation claims have remained volatile since its deregulation in 1995 leaving public entities faced with dramatic swings. Today's public employer can either be self-insured or in a fully insured, dollar one program. In either case, they may either adjudicate claims themselves or use a third-party administrator (TPA). The reality is that many employers unwittingly sabotage their claims.

Understanding how not to sabotage your claims regardless of having a TPA will result in the best possible outcome for your entity. This session highlights the pitfalls and mistakes that an employer can avoid when an employee is injured on the job. Discussion will center around preparing for litigation, witness statements and accident reports, first aid reporting requirements, and information that is discoverable by opposing counsel and the importance of being proactive in managing the claim with or without the claims adjuster.

At the completion of this session, attendees will be able to:

- Successfully prepare workers' comp claims for litigation

- Recognize the top 10 common mistakes that could sabotage the claim
- Learn how proactive employer involvement with the claim defense process leads to the best possible claim resolution

Speaker:

Cheri M. Estes, Esq., Partner, Law Offices of Weitzman and Estes

Irene R. Bowdry, Law Offices of Irene R. Bowdry

Moderator: Nina Cooper, Law Offices of Weitzman and Estes

Interest areas: Workers' Compensation, JPA Board, Pool Manager, General Interest

ERM for Risk Pools: Moving from Theory to Practice

Location: Blaisdel/Stanford

Enterprise risk management (ERM) is being implemented in risk pools throughout the country. Questions addressed in this session include: Will ERM create value proportionate to the effort? Who is doing it, and what are the results? What is the path forward? Speakers will discuss successful public entity ERM implementations, revisit the ERM value proposition, and discuss why ERM is ultimately indispensable to risk pools and their members.

At the completion of this session, attendees will be able to:

- Identify systemic risk drivers and emerging risks for risk pools and their members
- Understand why ERM framework and processes are the optimal solution for managing systemic pool and member risks
- Outline an ERM implementation timetable and project plan for their organization

Speakers:

Leo Costantino, Director, Industry Segment Programs, UCLA Extension

Robin Flint, Senior Risk Management Advisor, ACWA JPIA

Wendell Bosen, Senior Account Executive, Moreton & Company

Moderator: David Clovis, General Manager, California Joint Powers Risk Management Authority

Interest areas: Finance & Technology, JPA Board, Pool Manager, General Interest, Human Resources, Loss Control, Property & Liability

Who's Policing the IT Police?

Location: Tallac, Lake Tahoe Resort

It's safe to say that nearly all functions of a modern organization are dependent on technology. That fact, combined with an ever-increasing need to secure access to this technology, has resulted in technology staff assuming the role of "gatekeepers." But who's watching the tech folks? This promises to be a thought provoking session that includes discussion on the evolution of technology staff as the "gatekeepers" as well as a look at strategies for managing the risk related to who controls access and just how they do so.

At the completion of this session, attendees will be able to:

- Identify the gatekeepers of IT infrastructure
- Understand the risk associated with IT gatekeepers
- Take away one or more strategies to manage this risk
- Sleep better knowing there is a plan to control this risk

Speakers:

Rick Krepelka, Chief Operations Officer, Golden State Risk Management Authority

Ritesh Sharma, Manager, Finance and Accounting, Bickmore

Tuan "Tommy" Le, IT/IS Manager, Washington Schools Risk Management Pool

Moderator: Carl Sandstrom, Business Projects Manager, California Joint Powers Insurance Authority

Interest areas: Finance & Technology, Pool Manager, General Interest

Dealing with Danger – Strategies to Avoid Liability and Minimize Exposure for Dangerous Conditions of Public Property and Inverse Condemnation Cases



Location; South Shore Room, Harrahs

Strategies for risk management to defend dangerous conditions and inverse condemnation cases are essential. Pools need to identify ways to minimize exposure in these cases. The topics to be explored include dangerous conditions, early investigation of claims, training public works and other departments, cutting edge immunities, practice tips and more.

At the completion of this session, attendees will be able to:

- Effectively investigate claims early, preserve key evidence and avoid the pitfalls associated with early investigations.
- Identify claims for which early resolution should be considered and understand how to approach resolution.
- Understand and utilize cutting edge immunities in the defense of dangerous condition claims.

Speakers:

Richard Osman, Partner, Bertrand, Fox, Elliot, Osman & Wenzel

Michael Wenzel, Partner, Bertrand, Fox, Elliot, Osman & Wenzel

Moderator: TBD

Interest areas: JPA Board, Pool Manager, General Interest, Loss Control, Property & Liability

Transgender – Affirming Public Entities: What you need to Know

Location: Flying Cloud, Lake Tahoe Resort

Transpersons face barriers and bullying, and are at high risk for suicide. In this session you will leave knowing an overview of the ever-evolving laws on transgender issues under the California Fair Employment & Housing Act and how to support trans employees and even students to ensure that your entity is in compliance with California law. Particular attention will focus on employees' rights, access to facilities consistent with one's gender identity, restroom access, and how to handle sex-segregated facilities, including locker rooms, shower facilities, dress code standards and use of preferred names in lieu of the legal name.

At the completion of this session, attendees will be able to:

1. Understand the legal backgrounds of AB1266 and the fair employment laws
2. Differentiate between the various forms of gender and other discrimination
3. Weigh the impact of gender identity (i.e., policies, accommodations, etc.)
4. Have an awareness of legal protections for discrimination based on specific sexual minorities.

Speakers:

Kristine Kwong, Esq., Attorney/ Partner, Law Offices of Musick-Peeler

Karla M Rhay, Ed.D., CEO, CSJPA (Benefits and Risk Management),

Moderator: Melissa Weis, CSJPA, Administrative Services Manager

Interest areas: Legislative, General Interest, JPA Board, Pool Manager, Workers' Compensation, Healthcare, Human Resources, Loss Control, Liability

4:00 pm – 5:15 pm

“Doing Well By Doing Good”: Savings, Security and Value for Everyone with Structured Settlements and Professional Administration

Location: Emerald/Nevada, Lake Tahoe Resort

Focused on innovative, practical tools and tactics, this session will outline how the latest advances in structured settlement design and professional administration technology enable more settlements on more cases for less money with delivering significant value to both parties.

At the completion of this session, attendees will be able to:

- Leverage new strategies to settle more claims for less money while securing ongoing funding and coordination of care for every applicant and plaintiff on a wide variety of claims types and sizes,
- Design a protocol that eliminates all concerns about ongoing Medicare liability for all parties in both workers' compensation and liability claims, and;

- Shift settlement negotiations to needs-based, value-delivering discussion about protecting assets from creditors, safeguarding public assistance, enabling return-to-work, and ensuring a lifetime of income.

Speaker:

Ken Paradis, Chief Executive Officer, Chronovo, Inc.

Moderator: TBD

Interest areas: Finance & Technology, Workers' Compensation, General Interest, Loss Control

Pools and the Reinsurance Market – What you need to know!

Location: Blaisdel/Stanford, Lake Tahoe Resort

From the evolution of reinsurance to its current use and types that exist in today's risk pools, this session will address the part reinsurance plays in making the insurance market comprised of Pools, Captives, and JPA's more attractive and stable.

At the completion of this session, attendees will be able to:

- Define what reinsurance is and its purpose.
- Have an overall knowledge and an understanding on the various concepts and types of reinsurance.
- Gain knowledge in understanding the cost and benefits of being a purchaser of reinsurance.

Speaker:

Bill Harris, Managing Director, Guy Carpenter

Moderator:

Interest areas: JPA Board Members, Pool Managers, and Property and Casualty Risk Managers

Digital Threats more than a Virtual Reality

Location: Tallac, Lake Tahoe Resort

This panel will discuss the use of digital devices in employee misconduct, cyberbullying, school violence and other cyber-related matters. Email and texting play an important part in the grooming that leads to sexual misconduct. Issues related to Internet addiction and related mental health disorders will be explored. New assessment tools and researched instruments will be shared. Technology is moving faster than awareness of its impact. This panel discussion facilitates a conversation about the opportunities and risks inherent in our digital age as the year 2017 initiated access for many to new virtual worlds.

At the completion of this session, attendees will be able to:

- Understand the Coolidge effect and its impact on learning and behavior in classrooms.
- Gain an understanding of photo lockers used by students with a description of what took place in a district.
- Learn to use the Model Code of Educator Ethics and its Principal dealing with digital ethics as a tool to share among employees.
- Be able to create different policies to meet these challenges.

Speakers:

Daniel Shinoff, Esquire, Stutz, Artiano, Shinoff and Holtz

Glenn S. Lipson, Ph.D., Alliant International University, School of Forensic Studies

Moderator: TBD

Robin Fawkes, Director of Risk Management San Mateo County Schools Insurance Group

Interest areas: Healthcare, JPA Board, Pool Manager, General Interest, Human Resources, Loss Control, Property & Liability

Becoming the Master Chef of Your Balanced Health Plan While Navigating the Employee Benefits Pyramid

Location: Flying Cloud, Lake Tahoe Resort

Want to become a master chef of a successful employee benefits program? This session will systematically guide attendees through a recipe for success. Attendees will be provided the ingredients to include and to avoid, to create this healthy/balanced program. Is skinny better?



Understanding narrow networks, low fat plan designs vs. full fat options. Should you splurge or should you save?

At the completion of this session, attendees will be able to:

- Create a balanced employee benefits program
- Understand obstacles and pitfalls to avoid while developing your employee benefits program; and
- Understand skinny plans, and narrow networks

Speakers:

Ellen Alcalá, Employee Benefits Manager, California Schools Employee Benefits Association

Kristen Wesley, Regional Vice President Strategic Accounts, Anthem Blue Cross

Moderator: TBD

Interest areas: Pool Managers, Human Resources, Healthcare, JPA Board

THURSDAY September 14, 2017

8:30 am – 9:45 am

Ergonomics & Millennials: The Impact on Workers' Comp

Location: Emerald/Nevada. Lake Tahoe Resort

Risk managers have focused much of their attention on the needs of aging employees, while overlooking a potentially more challenging ergonomic conundrum — ergonomics for Millennials. In just a few years, Millennials will make up 75 percent of the global workforce, and they are entering the workforce having used technology all of their lives! This long history has solidified high-risk patterns and habits around that use of technology. Discover practical ways to manage young workers' comfort, deal with their potentially pre-existing injuries and the impact it will have on workers' compensation.

At the completion of this session, attendees will be able to:

- Identify the ergonomic issues that Millennials bring to the workplace
- Recognize the habits from life-long technology use that will affect ergonomic evaluations and workers' compensation
- How to persuade Millennials to ergonomically conform to a more structured workplace

Speaker: Kathy Espinoza, AVP/Ergonomics and Safety, Keenan

Moderator: Suzanne Trowbridge, Keenan

Interest areas: Worker's Compensation, Healthcare, Human Resources, Loss Control, Risk Management, Safety Specialists

HRAs: Defined Benefits that Define a Strong Commitment to Your Early Retirees

Location: Blaisdel/Stanford, Lake Tahoe Resort

Health Reimbursement Arrangement (HRA) is considered to be a defined contribution health care plan that may provide reimbursements for medical and dental insurance premiums and other eligible health care expenses. There are many benefits associated with the use of HRAs including triple tax savings, carry-over of unused funds from year to year, and flexibility and fiscal savings to both agencies and participants. This session will focus on the benefits for early retirees and agencies alike by offering options outside of the current group plans as facilitated by an HRA.

At the completion of this session, attendees will be able to:

- Understand what HRAs are and how they work
- Identify possible premium savings within their group plans
- How HRAs can benefit early retirees (and others)

Speakers:

Gail Beal, Senior Vice President, Keenan

Debra Yorba, Vice President, Keenan

Isaac Stern, Senior Vice President

Moderator: TBD

Interest areas: Healthcare, General Interest

Actuarial Assumptions and Results – Fact or Fiction

Location: Tallac, Lake Tahoe Resort

Do you understand the assumptions in your actuarial report and how they affect the resulting estimates? Pool professionals and governing officials need to “own” the assumptions in the actuarial report. Staff and board members don’t need to create the actuarial report, but must have a solid understanding of the basic assumptions contained in the report, be confident that they are reasonable and know how to properly use the actuarial results to evaluate and fund a risk sharing pool.

At the completion of this session, attendees will be able to:

- Understand the estimates and assumptions in an actuarial report
- Use the estimates to evaluate their pool’s financial health
- Avoid funding mistakes by understanding the limitations of the estimates

Speakers:

Marcus Beverly, First Vice President, Alliant Insurance Services

Mike Harrington, President Actuarial Services, Bickmore,

James Marta, Managing Partner, James Marta & Company

Moderator: Ken Hearnberger, Finance Manager, North Bay Schools Insurance Authority

Interest areas: Pool Manager, Finance, JPA Board

Technology Hot Topics:

Part 1: Digitally Transform your Safety Culture

Location: South Shore Room, Harahs

Technology is continuing to change the way people work and learn, so why aren’t you using these advancements to boost the effectiveness of your safety training? Safety training is often viewed as the obligatory, mundane class you need to attend to check the OSHA compliance box, but it can be so much more effective with the infusion of do-it-yourself technology. Learn how simple and cost effective it is to incorporate electronic learning into your safety program to meet the expectations of modern day cultures. From developing your own quick videos that address specific exposures to creating targeted, electronic resources that are appealing and timely, it can all be done with basic knowledge and little money. Providing these short, digital training resources that are both entertaining and informative is a key element in transforming your safety culture.

At the completion of this session, attendees will be able to:

- Learn how technology can help create more effective safety training
- Understand the importance of modular training opportunities
- Create and produce your digital training safety resources

Speaker: Jeff Johnstone, Risk Control Director, Bickmore

Moderator:

Interest areas: Loss Control, Technology, General Interest

Part 2: Where is Technology in Your Risk Toolbox?

Data, analytics, reports...etc. Everything is helpful when considering risk mitigating strategies. But where is the real time feedback? Is it even possible? If you can measure it, you can track it. If you can track it, you can improve it. Increased awareness leads to positive changes in behavior, thereby reducing risk. Consider technology driven solutions to have in your toolbox.

At the completion of this session, attendees will be able to:

- Identify applicable technologically driven methods to minimize exposures
- Learn how to seamlessly involve solutions into existing programs
- Increase risk and safety awareness through a realization of new perspectives

Speaker: Eric Dahlen, ARM, CSRM; Risk Officer, California School Risk Management, JPA

Moderator:

Interest areas: Loss Control, Liability, Technology

Transforming Healthcare through Care Delivery Innovation

Location: Flying Cloud, Lake Tahoe Resort

Year after year healthcare costs continue to rise at an unsustainable rate. While many have tried methods to rein in costs, none have been as effective as the most recent efforts in care delivery innovation. Look at accountable care organizations (ACOs) and payment innovation as reductions in unit costs alone will not deliver the results needed to make healthcare affordable. Discussions will include trends in the cost of healthcare with cost reduction as well as quality improvements.

At the completion of this session, attendees will be able to:

- Understand why the current system is unsustainable
- Understand how ACOs work
- Understand how some ACOs impact trends

Speaker:

Diana Gibson Pace, Vice President & General Manager, Premier Accounts, Blue Shield of California

Moderator: Quentin D. Blanton, Business Manager, Premier Accounts, Blue Shield of California

Interest areas: Healthcare, General Interest

10:00 am – 11:15 am

Successful Integrated Disability Management with Main Ingredient – Reasonable Accommodation!

Location: Emerald/Nevada, Lake Tahoe Resort

Panel discussion will bring focus on how employers can cook up cost savings in both workers' compensation and civil employment liability claims through integrated disability management. With the aging workforce, disabilities in the workplace are more likely to occur. Financial impact of such occurrences may be minimized, if not eliminated with effective integrated disability policies and procedures. Effectiveness depends on injury prevention, early intervention and gaining cooperation of stake holders in managing risks associated with disabilities.

At the completion of this session, attendees will be able to:

- Realize impact of legal requirements including Labor Code Section 4850 and how meeting requirements produces control over workers' compensation losses and preserves human resources;
- Understand duties of supervisors, human resources, claim administrators and union(s); and
- Appreciate policies and procedures for principles of problem solving in reasonable accommodation implementation.

Speakers:

Jo Ann Wood, Manager, Claims Consulting Solutions; Bickmore

Dennis Hernandez, Risk Manager, City of Hawthorne, California

Carol A. Kempner, Defense Attorney Partner, Graves, Bourassa, Rippinger & Kempner

Moderator: Beth Lyons, Senior Pool Administrator, Risk Pool Administrators

Interest areas: Loss Control, Workers' Compensation and Human Resources

JPA Members Role in Creating a Safety Culture for Your Agency to Thrive and Prosper

Blaisdel/Stanford, Lake Tahoe Resort

The 21st Century is proving to be one of the most difficult and dangerous times for public agencies. To ensure agencies thrive in these trying times, public employers must be prepared to address active shooters, child abuse, cyberbullying, bullying, transgender issues, law enforcement, and adverse legislative issues. A "TED Talk" style session will discuss the pool members' role in creating a positive culture of safety within your agency to help ensure employees and/or students have a physical and emotional safety platform to achieve excellence.

At the completion of this session, attendees will be able to:

- Learn what schools do to contribute towards creating unsafe environments
- Learn how to understand and avoid risky behaviors
- Implement tools at your district that will immediately create a culture of safety and accountability

Speaker:

John Stephens, Senior Vice President, Keenan & Associates

Moderator: Doug Ross, JPA Manager, Schools Association for Excess Risk

Interest areas: Workers' Compensation, JPA Board, Pool Manager, Human Resources, Loss Control, Property & Liability

Making the Most of Your Financial Assets: Portfolio Management Strategies & Reporting

Location: Tallac, Lake Tahoe Resort

Participants will learn fundamental knowledge and strategies necessary to build an effective investment program designed to maximize earnings while maintaining safety and liquidity. Participants will learn the basics of investment policy development, asset-liability matching, cash flow analysis, duration management, sector and issuer selection, competitive shopping, and reporting requirements.

At the completion of this session, attendees will be able to:

- provide participants with the fundamental knowledge and strategies necessary to build an effective investment program
- Be able to create an investment program design to maximize earnings while maintaining safety and liquidity

Speaker:

Sarah Meacham, Managing Director, PFM Asset Management LLC

Moderator: Dianna Sutton, Finance Manager, Association of California Water Agencies JPIA

Interest areas: Finance, General Interest

Police Body Worn Cameras: Ingredients for a Successful Program

Location: South Shore Room, Harrahs

This interactive session will examine the growing push to equip law enforcement officers with body worn cameras. Learn the pros and cons of having body worn cameras, the importance of a strong written policy, when to activate and deactivate cameras, how long to retain footage, how to respond to Public Records Act requests and the elements of a successful written program. All of these ingredients will help shape the future of law enforcement.

At the completion of this session, attendees will be able to:

- Identify the pros and cons of body worn cameras
- Understand the importance of and elements for a strong written policy
- Understand when to activate and deactivate cameras
- Address Public Records Act requests

Speakers:

Michael L. Wroniak, Esq. Partner, Collins Collins Muir + Stewart LLP

Christie Bodnar Swiss, Esq. Partner, Collins Collins Muir + Stewart LLP

Moderator:

Interest areas: JPA Board, Pool Manager, General Interest and Property & Liability

Disability Discrimination – It's (Now) a Family Affair

Location: Flying Cloud, Lake Tahoe Resort

Just when you thought managing the workplace couldn't get any more challenging, welcome to the newest theory of disability discrimination. Presenters will provide an overview of current federal and state law, focusing on the recent *Castro-Ramirez* case that has brought this type of "family member" claim into the forefront in California. Is there an affirmative duty to accommodate in addition to the duty to avoid discrimination? How does the California Family Rights Act (CFRA) work in conjunction with *Castro-Ramirez* by reinforcing and/or complicating an employer's obligations? The session will then move into "hypothetical" fact patterns, and utilize them in discussing the role of the interactive process, reasonable accommodation, and undue burden. The discussion will conclude with a discussion of best practices of what employers should do, and not do, in managing such situations.

At the completion of this session, attendees will be able to:



- Understand the words or information that may trigger an associational disability claim;
- Train supervisors how to manage the interactive process and reasonable accommodation duties in this context;
- Understand how particular communications with employees can either assist or undermine the ability to defend such a lawsuit

Speakers:

Richard S. Whitmore, Leibert Cassidy Whitmore

Dianne Dinsmore, Director of Human Resources, Contra Costa County, Administrative Services Unit

Moderator: Peter O. Glaessner, Allen, Glaessner, Hazelwood & Werth, LLP

Interest areas: Human Resources

2:00 pm – 3:15 pm

Slips, Trips & Falls – Fact or Friction?

Location: Emerald/Nevada, Lake Tahoe Resort

One of the oldest insurance scams is the slip and fall accident which has been used by individuals and organized groups for decades to rip off businesses and insurance carriers. Slip and falls are the second costliest bodily injury claim – second only to auto collisions. Fraudulent slip and fall claims rose 25% over the last five years. In lieu of video footage capturing the fraudulent act, evaluating the merit of a slip and fall claim can be a daunting task, and the fraudsters are fully aware of this. A panel of experts will discuss the most effective methods of handling suspected fraudulent slip/trip and fall accidents and share amazing video clips.

At the completion of this session, attendees will be able to:

- Identify suspected fraudulent slip/trip and fall claims through various red flags, and learn effective investigative techniques
- Recognize the scientific approach to investigating suspected fraudulent slip/trip and fall claims, with a live coefficient of friction forensics demonstration;
- Learn about effective defense strategies in litigating suspected fraudulent slip/trip and fall cases, with examples of actual suspected fraudulent slip/trip and fall cases caught on video, and how to utilize evidence in court;

Speakers:

Richard Harer, Vice President, Specialized Investigations, Inc.

William King, President/CEO, Impact General, Inc.,

John Madsen, Attorney, Liebman, Quigley & Sheppard

Moderator: Richard Harer, Vice President, Specialized Investigations, Inc.

Interest areas: Property & Liability, Workers' Compensation

What's the Secret in the "Secret" Sauce?

Location: Blaisdel/Standford, Lake Tahoe Resort

Risk sharing pools are frequently mistaken for traditional insurance. What are the similarities and differences; and how do pools educate staff, members, services providers and the public about who we are? And what is the difference between a risk sharing pool with in house staff versus contracted service providers for group administration, claims handling, risk control and other services. How these questions are answered is all a part of the recipes for creating, maintaining and growing your JPA.

At the completion of this session, attendees will be able to:

- Identify the difference between traditional insurance and self-insurance
- Identify the benefits of participating in a Risk Pool
- Understand some of the differences between self-administration versus using a third-party administrator

Speakers:

Rick Jenkins, Director of Member Services, SIA

Rob Kramer, President, Program Administration, Bickmore

Moderator: Rick Brush – Chief Member Services Officer, CSAC-EIA
Interest areas: JPA Board Member – General Interest

The Role of the Actuary in Employee Benefits

Location: Tallac, Lake Tahoe Resort

The role of the actuary is to determine a correct premium to be charged for coverage offered in an employee benefit program. Actuaries are trained through a strenuous examination process to be qualified to interpret relevant data from a benefit program to determine what the correct price should be in a future time period. Walk through the steps taken from data collection to final premium setting for a health insurance program and understand the difference between fully insured and self-insured offerings. .

At the completion of this session, attendees will be able to:

- Take the mystery away from how the renewal was developed
- Enhance the knowledge of the consumer so they feel more empowered to challenge/trust the renewal
- Understand and appreciate the long term value of a well-managed JPA

Speaker: Anil Kochhar, Vice President, ASA, MAAA, Aon Hewitt

Moderator: TBD

Interest areas: Finance & Technology, Healthcare, JPA board, Human Resources, Loss Control, General Interest, Pool Manager

Trust Experience – Officer Involved Shootings, Critical Incidents and Early Intervention Techniques to Control City Exposures

Location: Meteor/Mamie, Lake Tahoe Resort

Officer involved shootings and other critical incidents can create liability, morale, and public relations challenges, especially with today's advanced technology. Police excessive force incidents are particularly volatile situations that often develop into a city's highest settlement payouts. Planning for these incidents and preparing for them with a disciplined approach can minimize the impact they have on the city's monetary and public exposures. Discuss successful early-intervention techniques and approaches that municipalities have used to minimize exposure, reduce settlements, and derail fraudulent claims.

At the completion of this session, attendees will be able to understand:

- The advantages of a prepared and measured City response to an incident and providing support and guidance for City personnel involved in the incident
- The benefits of having in place an early resolution process
- The critical litigation techniques and tactics before and after a civil lawsuit is filed

Speakers:

James Fitzgerald, Partner in Counsel, McNamara, Ney, Beatty, Slattery, Borges & Ambacher LLP

Noah Blechman, Partner, McNamara, Ney, Beatty, Slattery, Borges & Ambacher LLP

Craig Wheaton, Senior Litigation Manager, Bickmore

Tom Kline, Risk Control Manager, Bickmore

Moderator: Jeff Johnston, Risk Control Director, Bickmore

Interest areas: Liability, JPA Board

Physical and Sexual Abuse – How Do We Make It Stop?

Location: South Shore Room, Harrahs

The California Supreme Court is reviewing legislation that would eliminate the statute of limitations on abuse claims. If passed, the financial consequences would be significant. Whether the legislation is upheld or not, abuse needs to stop. An established abuse prevention program will protect kids, schools and your community. This session will provide an 11-Step Child Abuse Prevention Program including Boundary Policies, Sexual Harassment Policies and other child abuse prevention tools.

At the completion of this session, attendees will be able to:

- Review Tools & Resources to prevent abuse

- Understand California Law and Federal Law legal statutory exposures
- Recognize Legal and Preventative Strategies to reduce physical & sexual abuse

Speakers:

Ron Martin, Northern California ReLiEF JPA Manager, Keenan & Associates

Louis Leone, Leone & Alberts, LLC

Diane Cranley, CSA Prevention Specialist, TAALK

Moderator: Ron Martin, Northern California ReLiEF JPA Manager, Keenan & Associates

Interest areas: Pool Manager, Loss Control, Property & Liability

The Importance of Legislative Advocacy

Location: Flying Cloud, Lake Tahoe Resort

Employers have a responsibility to be aware of the status of legislation which may impact their agency, coverage lines, employees and resources. This session will provide a discussion of how bills are presented, how to stay current and how they can change. The importance of the employer's involvement and understanding of the process can be key to positive outcomes

At the completion of this session, attendees will be able to:

- Understand the impact of legislative activity on your industry/resources/employees and community
- Recognize who is proposing legislation and why
- Act on pending legislation, make your concerns and support known

Speakers:

Janet Selby, Executive Director, North Bay Schools Insurance Authority

Julianne Broyles, Legislative Advocate, California Association of Joint Powers Authorities

William M. Clayton, Director, Loss Control at Keenan & Associates

Mark Rakich, Chief Consultant, Committee on Insurance

Moderator: Jacquelyn Miller, Manager, Workers' Compensation, Bickmore

Interest areas: Legislative, General Interest

3:45 pm – 5:00 pm

Pool Roundtable – Issues of Common Interest

Location: Emerald/Nevada, Lake Tahoe Resort

This session is a chance to outline issues of common interest among public entity pools across North America, including areas pool executives and Boards are focused on as they engage in strategic planning conversations. What are the strengths and weaknesses pools face, and what opportunities and threats are posed by our external environment? With more conversation than presentation, join this session to help identify key current issues and share experiences that will provide useful insight to all pools.

At the end of the session, attendee will be able to:

- Identify emerging, national pooling issues
- Plan strategically for issues that might impact an individual pool's operation
- Share insights from other pools, including how to address weaknesses or threats to the pooling industry

Speakers/Moderators:

• Martin Brady, Executive Director, Schools Insurance Authority

• Michelle Carter, Member Services Manager, Association of Governmental Risk Pools

Interest Area: JPA Board, Pool Manager, General Interest

Board Governance 101 Success Strategies

Location: Blaisdel/Stanford, Lake Tahoe Resort

Being a board member is more than appearing at meetings or taking action on agenda items. Board members are the forward-thinking fiduciaries charged to drive the organization toward its strategic initiatives. There are many models but in all, pool managers lead and board members by adopting sound, ethical, and legal governance and financial management policies, as well as by making sure the nonprofit has adequate resources to advance its mission. Whether you are a new pool manager or sit on a JPA Board, there are bound to be questions that center around governance models that instill collaboration, transparency and responsiveness. In this fast paced session, time will be spent addressing the role of the board member, board governance models, fiduciary responsibility, conflict of interest concerns and FPPC reporting.

At the completion of this session, attendees will be able to:

- Identify how to empower leadership
- Inspire board members that will effectively assist in determining organizational mission and purpose
- Strengthen programs and services, ensure transparency, engage adequate all in an inclusive, participatory model that promotes accountability.

Speaker:

Robert J. Feldhake, Esq., The Feldhake Law Firm

Moderator: Karla M Rhay, Ed.D., CEO, CSJPA (Benefits and Risk Management)

Interest areas: Legislative, JPA Board, Pool Manager, Finance & Technology

Managing a Data Breach: The Life Cycle of Cyber Risk

Location: Tallac, Lake Tahoe Resort

This session will survey emerging cyber risks facing public entities, including the continued rise of ransomware and sophisticated cyber threats. It will identify vulnerabilities common to the public entity space, as well as typical threat vectors followed by malicious actors. After discussing these risks, the session will discuss best practices and strategies to mitigate these risks for public entities, both before and after an incident.

At the completion of this session, attendees will be able to:

- Identify major and emerging cyber risks in the public entity space
- Identify vulnerabilities common to the public entity space
- Identify common strategies taken by malicious actors to exploit vulnerabilities
- Identify mitigation strategies and expertise, both before and after an incident

Speakers:

Michael Phillips, Specialty Lines Claims, Beazley Group

Colin Zarbough CEH, CISA, HCISPP, QSA, Manager Security and Privacy Consulting, RSM US LLP

Dan Mellon, A.R.M, Director of Risk Management, Chino Valley High School District

Moderator: Lilian Vanvieldt, Senior Vice President, Alliant Insurance Services,

Interest areas: Risk Managers, Pool Managers, Claims, Personnel, Finance Directors, Property and Casualty, Cyber Liability, Claims, General Interest

Student Civil Rights Litigation Against School Districts – Have the Floodgates Opened?

Location: Meteor/Mamie, Lake Tahoe Resort

The rights of public education students have been a hot topic in the news with an unprecedented number of US Supreme Court cases on issues including disability rights, transgender rights and special education. Moreover, attorneys representing students have trended towards “enhancing” their claims and lawsuits with actions founded in “civil rights.” This seminar will cover the elements of these types of cases, the types of damages available to claimants, and strategies to dismiss or minimize the impact of this type of litigation through the discussion of real life case studies and war stories from the panel.

At the completion of this session, attendees will be able to:

- Understand the federal and state laws under which claims and suits may be brought and the best defenses and settlement strategies available to eliminate or minimize exposure
- Evaluate pre-litigation claims under the Government Claims Act and other statutes for timeliness and appropriateness
- Help Districts protect themselves by coordinating across departments and addressing injuries and grievances before they become a claim or suit

Speakers:

Kimberly A. Smith, Attorney, Law Offices of Kimberly A. Smith

Melissa Hatch, Partner, Hatch & Cesario

John W. Dietrich, Partner, Atkinson, Andelson, Loya, Rudd & Romo

Moderator:

Interest areas: General Interest; Property & Liability

Americans with Disabilities Act 25 years later: Understanding and Reducing your Risk Exposure

Location: South Shore Room, Harrahs

ADA Title II public entity regulations have been in place for over 25 years but continue to evolve with the adoption of revised state and federal regulations, case law and settlements. This session will provide an overview of the original key Title II rule requirements, discussion of the ADA/CBC accessibility building standards, as well as up-to-date details on such topics as service animals and the emerging issue of website accessibility. Legal review of recent case law and U.S. DOJ/U.S. Dept. of Education settlements and highlight individual key relevant cases and the lessons that can be learned from them.

At the completion of this session, attendees will be able to:

- Know more about the legal landscape from recent public entity ADA-related complaints and cases
- Understand key ADA and related laws and regulatory requirements
- Identify resources available to assist with your ADA compliance efforts

Speakers:

Domenic Spinelli, Esquire, Spinelli, Donald & Nott

Bryan Moffitt, ADA Specialist, Schools Insurance Authority

Moderator: Martin Brady, Executive Director, Schools Insurance Authority

Interest areas: General interest, Loss Control, Property & Liability

The Election is over...Changes and Implications in Healthcare for Schools

Location: Flying Cloud, Lake Tahoe Resort

November 2016 is behind us and there is a new administration in the White House. The panel will discuss what has been seen since the election and what to anticipate will occur under the Trump Administration, the impact to schools and what carriers and service providers are doing to prepare for the future of healthcare. Discussion will be focused on most current efforts and trends.

At the completion of this session, attendees will be able to:

- Understand some of the challenges with our current healthcare system
- Listen to providers explain what their respective companies are doing to mitigate some of the healthcare challenges
- Learn what we can do to manage our own health care during this volatile time in the industry

Speakers:

Terri Scott, Senior Director, Care Coordination, Dignity Health

Andrew Kiefer, Director, Government Affairs, Blue Shield of California

Anthony (Tony) Barrueta, Senior Vice President of Government Relations for Kaiser Foundation Health Plan, Inc. and Kaiser Foundation Hospitals

Moderator: Won Andersen, Senior Vice President, Aon Hewitt

Interest areas: All

FRIDAY September 15, 2017

7:30 am – 10:30 am
Registration Open

7:30 am
Full American Breakfast
Location: Ballroom, Lake Tahoe Resort

8:00 am – 10:00 am
Location: Ballroom, Lake Tahoe Resort
Business meeting, Legislative update, Keynote Mike Madrid

10:00 am
Conference concludes