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INTRODUCTION

Hello,

Thank you for your interest in the PRISM's Enterprise Risk Consultants (ERC) Service. Rest assured that our pool of consultants are ready, willing and able to assist with your special project work. Each consultant has undergone a comprehensive evaluation process, to include review by the Member Services Committee, who themselves have diverse backgrounds, including Risk Managers, Finance, Human Resources, Risk Control, and other skill sets, and finally, a background check conducted by an independent background check firm.

The Consultants are highly-experienced individuals with a wide scope of risk management expertise in the following areas:

- Accounting/Risk Finance
- Claims Management
- Human Resources
- Information Technology
- Risk Control
- Risk Management

Many are retired public agency professionals or private sector consultants who are able to bring tremendous experience and expertise to your short-term project.

The consultants contract with PRISM and are fully insured. This allows the consultant to bill PRISM directly for services rendered to the participating member, negating the member's need to otherwise go through their own Request for Proposal (RFP) process for similar services.

Please have a look at the e-Guide and let us know if we can help you with a project, or if you have any questions.

Sincerely,



Rick Brush
Chief Member Services Officer



CONSULTANTS

(Click on a name below to read Consultant Profile)

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BOB MAY

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
6 MONTHS +

Experience/Titles Held:

- CJPIA – Risk Management Program Manager & Senior Risk Consultant
- Fire Chief – California Fire Agencies

Education:

- Juris Doctor Degree – Citrus Belt Law School, Riverside, CA
- Bachelors of Law Degree – Peninsula University, Mountain View, CA
- Certified Professional in Fraud Identification – The Institutes
- Workers' Compensation Claims Administration – The Institutes

Certifications/Licenses/Awards/ Memberships:

- EMT and Fire Instructor
- Publications: Employment Practices - Keeping You Out of Court

Service Area		Rates (per hour)	Years of Experience
Claims Management	Litigation Manager	\$150-200	15
Human Resources	Strategic Planning	\$150-200	15
Risk Management	Risk Manager	\$150-200	10
	Risk Analyst	\$150-200	15
	Crisis Management (PIO)	\$300	25

Work History:

Robert “Bob” May is the owner of Mainstream Unlimited, a consulting firm for private and municipal agencies in the areas of Risk Management and Organization Behavior.

He is the former Risk Management Program Manager for the California Joint Powers Insurance Authority (CJPIA). While at CJPIA, his responsibilities included providing risk management guidance to Authority members and to 5 regional risk managers.

Prior to joining the CJPIA, Bob worked for over thirty years in the California fire service. He has conducted training in the areas of organizational behavior, labor relations, strategic planning, and career development. Bob has also conducted leadership training for city councils and special district boards to assist in the understanding of council/manager form of governance. He has a broad depth of municipal and special district experience.

Bob has conducted several regional trainings for PRISM in Active Shooter, Workplace Violence, Crisis Management and Incident Management. He conducted training on organizational team building and organizational behavior. He has also provided guidance in litigation employment matters including reviewing internal investigation reports.

CAROLE D. MCCULLEY

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY +

Experience/Titles Held:

- Owner and Consultant at CGM Consulting
- Consultant at Prentice Long PC
- Modoc County Dept. Social Services
- Modoc County Public Guardian
- Program Manager II
- Interim Program Manager
- Social Worker Supervisor II

Education:

- Masters of Science/Psychology – University of Phoenix
- Bachelors Degree in Behavioral Science/Social Work/BSW– California State University of Chico
- University of California UC Davis Extension

Certifications/Licenses/Awards/Memberships:

- Certified Public Guardian with California Association of Public Administers, Public Guardians, and Public Conservators and appointed by Modoc County Board of Supervisors
- Certified Federal Case Reviewer with Northern Training Academy

Service Area		Rates (per hour)	Years of Experience
Claims Management	Return-to-Work Coordinator	\$100-150	10
Human Resources	Strategic Planning	\$100-150	10
Risk Management	Project Manager	\$100-150	15

Work History:

Carole is the owner and consultant at CGM Consulting since June of 2022. At this role she managed and resolved complex Human Resource issues and employee reviews including but not limited to Skelly hearings and progressive discipline plans. She created and implemented a recruitment and retention plan. To add, she evaluated employee's performance, workload, and Agency culture. Carole also implemented mandated programs with the most minimal cost. She trained employees in specific program knowledge and employee development.

She was a consultant to Alpine County HHS from August of 2021 to June of 2022. Within this role, she oversaw the direct and indirect services and overall program function in Child Welfare, In Home Support, Adult Protective Services, and Public Guardian/Public Conservator. She evaluated employees/programs and consulted with Administration to minimize overall liability and improve program performance. She provided direct and indirect training and support to employees in administrative positions.

With her long stint at Modoc County Dept. Social Services, she earned the titles of Modoc County Public Guardian, Program Manager II, Interim Program Manager, and Social Worker Supervisor II.

CHARLES MITCHELL

Geographic Area
Preferred:
STATEWIDE
(on-site only)

Assignment Length
Preferred:
6 MONTHS
OR LESS

Experience/Titles Held:

- Risk Manager: managed self-insurance funds/losses; purchased commercial insurance coverage & implemented comprehensive RM programs

Education:

- Master of Science – USC, LA, CA
- Masters in Business Administration – USC, LA, CA: Management Science
- BS – Cal Poly State University, San Luis Obispo, CA:
 - * With honors: Mathematics & Aeronautical Engineering

Certifications/Licenses/Awards/Memberships:

- Insurance Institute of America - Malvern, PA: Associates in Risk Management (ARM)
- PRISM:
 - * President, and a member of various committees, including: Board of Directors, Executive, Finance, Underwriting, & Medical Malpractice
- CAJPA:
 - * Accreditation Committee Member

Service Area		Rates (per hour)	Years of Experience
Claims Management	Liability Claims Manager	\$150-175	30
Risk Management	Risk Manager	\$150-175	38
	Risk Analyst	\$150-175	38

Work History:

I have over 35 years of combined experience in public agency risk management for two counties and a joint powers authority. Supervised both in-house and 3rd party claims activities for liability, workers' compensation, and property programs.

My experience included managing self-insurance funds and losses, purchasing commercial insurance coverages based on fund retentions, and implementing comprehensive risk management programs to reduce loss exposures through safety programs and contract review policies and procedures. Consulted with county departments and JPA member entities in the development and implementation of programs to meet their specific needs.

I participated in various risk related organizations, including PRISM, PARMA, PRIMA, and CAJPA. For PRISM, I served as: President, Executive Committee member, Board member, and a member of various committees: Finance, Underwriting, and Medical Malpractice. For CAJPA, served a member on the Accreditation Committee that reviewed applications from JPAs for CAJPA accreditation

DANIEL DELAC

Geographic
Area
Preferred:
ANY (remote
preferred)

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- SMUD
 - Insurance Program Manager
 - Sr. Risk Management Analyst
- Various positions with City of Salinas in the risk and insurance capacity

Education:

- Master of Public Administration - National University
- BA, Political Science - Public Administration & Economics - UC Davis - Davis, CA

Service Area		Rates (per hour)	Years of Experience
Risk Management	Risk Manager	\$125-250	30
	Project Manager	\$125-250	10

Work History/Experience:

- RISK MANAGEMENT of a Complex Property, Casualty and Executive Risk Mgt / Insurance Program for the Sacramento Municipal Utility District (SMUD). I worked at SMUD 39 years, with the last 15 or so as Risk Manager and I retired in July of 2022. I directed the following:
 - a. \$30M annual risk mgt budget
 - b. Recruitment and selection (i.e., RFPs) and management of insurance brokers and TPAs (liability and workers' comp)
 - c. Risk identification, evaluation and selection of risk treatment methods - mitigation, purchase of insurance, captives, and retention, etc.
 - d. Development and negotiation of coverage scopes of all lines of P & C and Executive Risk Insurance
 - e. In-person presentation of underwriter presentations to insurers in the USA, London, Bermuda, Far East
 - f. In-person negotiation and recovery of property insurance claims valued in the tens of \$M
 - g. Presentations and recommendations to the SMUD BOD
- As a CONSULTANT and OWNER of DGD Risk and Insurance Consulting, LLC, since 2021:
 - a. Marketing for Fireline Defense, LLC, a consulting firm that performs on-site wildfire risk assessments for commercial, industrial and public entity property owners, in order to reduce wildfire risk and to enhance terms and conditions of property insurance
 - b. Client and project risk assessment and insurance portfolio evaluation for SixCo Nevada, Inc. a consortium of innovative companies focused on development of infrastructure
 - c. Independent work including assessment of public agency and joint power agencies' risks, insurance coverages, and priorities to be pursued within their respective risk management programs
- As an ANALYST in the Salinas City Manager's Office from 1977 through 1982:
 - a. Assist City Manager on risk management, human resources, finance, business continuity, housing mediation, and other functions
 - b. Direct insurance broker, consultants, liability and WC TPAs
 - c. Present reports and recommendations to the City Council

List of Consultants

GAIL KIYOMURA

Geographic
Area
Preferred:
NOR CAL

Assignment
Length
Preferred:
1-6 MONTHS

Experience/Titles Held:

- Risk Management Consultant
- Risk Manager
- Deputy Director of HR
- Principal - Insurance

Education:

- Bachelor of Arts, Music, San Jose State University - San Jose, CA

Certifications/Licenses/Awards/

Memberships:

- Chartered Property Casualty Underwriter (CPCU)
- Associate in Risk Management (ARM)

Service Area		Rates (per hour)	Years of Experience
Risk Management	Risk Manager	\$200-250	35

Work History:

Experienced risk manager for over 35 years in various industries:

- Retail grocery
- Public utility
- National science laboratory
- Public entity

Previous chapter president with the Golden State Risk and Insurance Management Society, Inc. (RIMS) and a successful history of working in the non-profit organization management industry.

Skills include:

- Insurance archeology
- Enterprise risk management
- Analytical skills
- Management
- Mergers & acquisitions
- Leadership
- Strong business development

Currently working with clients to research and find historical policies (archeology) to tender claims to previous insurance carriers.

GERRY PRECIADO

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- President and Professional Wedge Remover
- Director of Employment Practice Consulting
- Director of Litigation Management

Education:

- Juris Doctor, UCLA - Los Angeles, CA
- BA, UCLA - Los Angeles, CA

Certifications/Licenses/Awards/ Memberships:

- State Bar No. 187348 - Inactive

Service Area		Rates (per hour)	Years of Experience
Risk Management	Employment Practice Consultant (AB1825, AB1234, Misc)	Flat Rate Per Session (\$1750-2150)	21
	Conflict Resolution Consultant	\$300/hr or Negotiable Project Rates	15

Work History:

There are two categories of services that I can provide for PRISM's membership under the category of Employment Practices Liability (EPL) prevention. First, conflict resolution services, and second, EPL training services.

Conflict Resolution:

When relationships go bad, and people require a miracle, that is when they call me. I am not a mediator, I am a professional wedge remover. I pinpoint the core pain points in relationships and the behaviors driving in the proverbial wedges, and provide the solution or formula for their removal. Whether it is a leadership team at odds, two individuals who cannot get along, or two teams of employees who are in open conflict, dysfunction and disharmony abound. In such circumstances, little gets done and morale deteriorates. My focus is not mediation where everyone is asked to compromise, but actual root cause problem solving.

EPL Training:

Every public entity is required to provide mandatory harassment prevention training (AB1825) and public entity ethics training (AB1234) to its employees. I have been providing these compliance trainings as well as other professional and organizational development training offerings to public entity clients for more than two decades. My approach and philosophy is that mandatory training does not have to be boring or torturous. I provide training that is entertaining, educational, engaging and even inspiring.

I provide these services for public entities of all sizes. Whether it is the 200,000 employee University of California system or small public entities with less than 10 employees, I provide the very best I have to offer to meet my clients' needs.

List of Consultants

HEATHER THOMSON, CPA

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 month+

Experience/Titles Held:

- Chief Financial Officer
- Director of FP&A
- Controller
-

Education/License:

- BSBA (Accounting), Sacramento State University - Sacramento, CA
- CPA, California #111649

Professional/Community Involvement:

- Lifetime Member and volunteer for the Womens Veterans Alliance
- CalCPA Member and Fundraising volunteer for Keaton's Child Cancer Alliance

Formerly served:

- Finance Committee CAJPA (co-Chair)
- Participated in a number of Financial and Risk Management analytics panel presentations at the entity's Spring Workshops and Annual Conferences. CSDA Finance and Audit Committees (member)

Service Area		Rates (per hour)	Years of Experience
Accounting/ Risk Finance	Chief Financial Officer	\$150-300	10
	Accounting/Finance Manager	\$125-150	25
	Budgeting/Analyst	\$125-150	25
	Strategic Planning	\$150-200	20

Heather is the owner of HT CPA Services, a consulting firm providing specialized and tailored finance and risk management services for public sector entities. Her goal, as a solution oriented resource and government finance expert, is to aid in achieving financial transparency, accuracy and mitigated risks.

Work History:

Her professional experience began in service to our Country in the United States Navy managing procurement and logistical resources. In service to others, she has continued for the past 25 years in a variety of Financial and Risk Management leadership positions in both the private and public sectors. During her career, she has obtained Executive financial leadership experience in entities providing risk management services to public agencies in California. She has also led other finance teams fulfilling the product and service needs of K-12, state and local organizations.

She is the former Chief Financial Officer of the Special District Risk Management Authority (SDRMA). While at SDRMA, she led their Finance department, reported all financial results and proposed improvements/progress to the Board of Directors and led their CAJPA Certification (with Excellence). Risk loss reviews, member rate setting, program and insurance structures, pricing and negotiations, budgeting, external audit facilitation, strategic planning and actuarial report analytics were among her multiple responsibilities.

Prior to her time at SDRMA and since, she's had extensive experience in all aspects of fiscal processing: purchasing, billing and collections, payroll, HR onboarding, financial reporting, planning and analysis, tax filings, budget preparation and forecasting. As an Executive, she has instituted insurance review and renewals, strategic multi year planning, authoring several process and procedure manuals, and profit margin improvements. She has obtained technical expertise in system conversions, advanced database and reporting design, automation of previous manual processes and various third party application integrations.

List of Consultants

JAMELLE PECK

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 MONTH+

Experience/Titles Held:

- Claims Manager, Assistant Manager, WC Administrator
- WC Examiner and Adjuster
- Workers' Compensation Consultant Services – Intermittent since 1990

Education:

- MBA - CSA LA - Los Angeles, CA; Emphasis - Management
- BS, Business Administration - USC - Los Angeles, CA; Emphasis - Marketing/Management

Certifications/Licenses/Awards/Memberships:

- SIP Certificate - June 1990.
- WCCA Certificate, June 2010.
- Experienced Adjuster Designation – CEU valid through June 2022.
- COSIPA - Board of Directors, Treasurer
- Community Service Volunteer – Economic Development, Social Action, Physical and Mental Health - Delta Sigma Theta Sorority, Inc., Foothill Chapter
- Volunteer Mentor – Youth Moving On Program, Hillside Education Center, Pasadena, CA
- Member, Toastmasters Club 1913, Los Angeles, CA

Service Area		Rates (per hour)	Years of Experience
Claims Management	WC Claims Manager	\$135-175	25+
Risk Management	Project Manager (specific to WC)	\$125-175	10

Work History:

My professional experience in Workers' Compensation spans over 35 years, beginning as a Claims Adjuster within the private insurance community, later moving into management in self-administered self-insurance, then transitioning into public service working for full-service municipal agencies. Through the course of my career, I worked effectively in every aspect of workers' compensation claims management in a municipal or corporate environment, including expert handling of special projects.

Over the years, I developed strengths in the following claims management areas:

- Management of Claims Personnel
- Staff Training; Facilitation of Staff Continuing Education
- Cost Containment Management; Program Budgeting
- Claim Office Workflow Process Improvement and Best Practices
- Project Management
 - Transitioning to a Paperless Office
 - Request for Proposal (RFP) Development and Process
 - Vendor & Contract Management for Vendor Services
 - TPA Management; Conducting TPA audits

The composite of my background is reflective of my ability to produce strong claims teams and manage claims department best practices, resulting in passing PAR audit scores for over the past 15+ years. I welcome the challenge of helping other agencies achieve strong and effective claims teams.

List of Consultants

JEFFREY SCHEEL

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

Experience/Titles Held:

- Project Director, Quality Assurance & Independent Verification, and Validation
- Project/Contract Manager for large-scale System Development Projects for the State of California
- Project Manager Los Angeles, Orange, Riverside, and San Bernardino Counties Police Chief's Association
- Director of System Development – Los Angeles Police Department
- Project support for:
- Secretary of State's VoteCal System
- CalPERS - myCalPERS Project
- Aerojet Managed Services Transition
- Quest Technology Management
- Business Resumption & Disaster Recovery
- San Joaquin & Nevada County Technology Assessments

Education:

- BA, Business Administration & Management Information Systems, California State University - Fullerton, CA

Certifications/Licenses/Awards/Memberships:

- Project Management Institute (member)
- Project Management Professional (PMP) Certification

Service Area		Rates (per hour)	Years of Experience
Information Technology	Chief Information Officer	\$160-180	32
	Technology Analyst	\$140-160	32

Work History:

I bring over 30 years of experience in large-scale public-sector systems implementation, executive level strategic technology management, project support services, and project management/oversight for a wide variety of local and state government entities.

I started my career as a Manager of System Development for the Los Angeles Police Department and transitioned to consulting as the Technology Manager for the Los Angeles, Orange, Riverside, and San Bernardino Counties implementation of the State of California's Statewide Integrated Narcotics System (SINS) project, one of the largest IT projects ever undertaken by the State of California.

As the owner of a public-sector technology consulting firm for the last 20 years, I have provided strategic planning, project management for large-scale public-sector systems development and integration, and a wide range of technology management and procurement experience to diverse agencies at all levels of government.

My extensive experience covers a wide variety of vertical and horizontal markets outlined below:

Horizontal Services

- Business Resumption/ Disaster Recovery Services
- Information Security Assessments
- Executive Level Strategic Planning
- Hosting and Cloud Services Assessment
- Independent Project Oversight and Quality Assurance/IV&V
- Project Management
- Procurement Support
- System Test Planning
- Business Process Review/Improvement
- Strategic Planning
- Information Security

Vertical Markets

- Pension Systems
- Public Safety/Criminal Justice
- Secretary of State/Corporate Filings
- HR/Payroll
- Transportation
- General State Government
- General Local Government

List of Consultants

JILES SMITH

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

Government

- City of Fontana – Risk Consultant
- City of Modesto – Risk Manager
- City of San Bernadino – Risk Manager
- Riverside Transit Agency – Risk Manager
- State Fraud Assessment Commission – Commissioner
- County of San Bernardino Equal Opportunity Commission – Chairman
- State Fund State Contracts Section – Claims Manager

Private Industry

- Frontier Communications - Director of Risk Management, Claims and Integrated Benefits
- Grainger Industrial Supply - Area EH&S Manager (Western States)
- JB Hunt Trucking – Assistant Director of Safety (Western Region)
- Roadway Express Trucking – Western Region Risk Manager
- University of California, Riverside Extension – Teacher of Risk Management, Diversity and Inclusion, and Conflict Management

Education:

- MBA – Risk Management: Concordia University
- BA – University of Stanislaus

Certifications/Licenses/Awards/ Memberships:

- CPDM
- Executive Program (EP) in Safety – ASSP
- ASSP Member (Orange Chapter)
- WCCP
- PRISM's Pass the Baton (PBM) Program

Service Area		Rates (per hour)	Years of Experience
Claims Management	WC Claims Manager	\$150	30
Risk Control	Safety & Loss Control Manager	\$150	30
Risk Management	Risk Manager/ Director	\$150	20
	Contract Review	\$150	20

Jiles Smith is the president and CEO of JS Risk Consulting, providing risk management and safety support to organizations by identifying and mitigating risks, strengthening organizational risk culture, and achieving regulatory standards for compliance. He is also a Licensed Property and Casualty Agent/Broker, License #4298538.

Work History:

Jiles has been in the Workers' Compensation and Risk Management field for 30 years in both public and private industry. He was appointed by two Governors to the California State Fraud Assessment Commission from 2006-2015. Through the course of his career, he worked effectively in every aspect of risk and workers' compensation claims management in a municipal or corporate environment. He has also spoken and participated in various panels, conferences and workshops on risk management, diversity, safety, and loss control.

His experience includes the following:

- Auto, property, and general liability
- Workers' Compensation
- Subrogation
- Auditing
- Litigation, mediation, and depositions
- Contract administration and indemnification
- Loss control, OSHA compliance, safety committees, review of accidents
- Training programs, risk safety, and interactive process
- Conflict resolution
- Diversity and inclusion

As a consultant with city governments, his goal is to help the city enhance their training programs, reduce worker's compensation and liability claims, evaluate TPA, provider and attorney performance, and support litigation decisions.

List of Consultants

DR. JOHN PRESTON

Geographic Area
Preferred:
SOUTHERN CALIFORNIA & VIRTUAL

Assignment Length
Preferred:
1-6 MONTHS

Education:

- University of Southern California
- California State Polytechnic University - Pomona
- University of California - Riverside
- Los Angeles College of Chiropractic/So. Cal University of Health Science
- Pasadena City College
- Citrus College

Degrees:

- Associates in Arts (AA)
- Bachelor of Science (BS)
- Doctor of Chiropractic (DC)

Certifications/Licenses/Awards/

Memberships:

- Associate in Risk Management - Public Entities (ARM-P)
- Associate in Loss Control Management (ALCM)
- Associate in Risk Management (ARM)
- Certified Health Care Reform Professional (CHCRP)
- Completed 60% of CPCU exams to date
- Instructor - American Red Cross First Aid/CPR/AED
- Certified Chief Business Official (CBO) - UC Riverside/CASBO

Service Area		Rates (per hour)	Years of Experience
Risk Control	Chief Risk Control Officer	\$185	6
	Safety & Loss Control Analyst II	\$165	14
Risk Management	Risk Manager	\$175	15
	Pool/JPA Administrator	\$200	1
	Risk Analyst	\$165	
Other	P/L Claim Coordinator	\$175	15
	Insurance Requirements for Contracts	\$175	5

Work History:

Dr. John Preston has been self employed at a Risk Management Consultant since the year of 2019. Here he assesses Risk Management program efficiency, managed property/liability claim handling and TPA. He also assesses and assigns insurance requirements in contracts for public entities. He assists entities in legal depositions and mediations alongside the counsel. He creates and implements business practices and procedures designed to limit liability, property, and work comp risk of loss.

Dr. Preston was a Director of Risk Management at three different school districts:

- San Bernardino Unified School District
- Murrieta Valley Unified School District
- Riverside Unified School District

He was also the Executive Director at Tri-County Schools Insurance Group Joint Powers Authority. He managed self-insured property/casualty and benefits programs and insurance placements for public entities, including schools, counties, cities, and superior courts.

He held the title of Loss Control Area Manager at The Hartford in the Southern California Regional office. Here he managed professional Loss Control/Safety and support staff of 30 in Southern California and Arizona.

List of Consultants

DR. KARLA RHAY

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
6 MONTHS
OR LESS

Experience/Titles Held:

- CEO at CSJPA/CSRM
- Instructor for Risk Management Practicum for ACSA School Business Managers Academy
-

Education:

- Doctorate, USC School of Rossier - Los Angeles, CA
- Masters, Pepperdine University - Malibu, CA
- Bachelor of Science, University of Phoenix - Diamond Bar, CA

Certifications/Licenses/Awards/

Memberships:

- CAJPA - President (2020)
- SELF JPA - Secretary (2019)
- Administrator of the Year (2019)
- Classified Leader of the Year (2019)
- State Fraud Assessment Commissioner (2018)

Service Area		Rates (per hour)	Years of Experience
Human Resources	Strategic Planning	\$165-250	18+
Risk Management	Pool/JPA Administrator	\$200-250	15+
	Project Manager	\$125-175	32+

Work History:

For the past 32-years, I have served public education, of which the last 15-years spent as the Chief Executive Officer for the California Schools Employee Benefits Association (CSEBA) JPA and the California Schools Risk Management (CSRM) JPA. Prior to that, I have worked in K-12 settings and the private sector.

My professional background encompasses risk management, workers' compensation, employee benefits, leadership, pool management, and strategic consulting. I currently teach a risk management practicum for the Association of California School Administrators (ACSA) and the University of California Extension. I have also spoken and participated in various panels and workshops on pooling, sexual misconduct prevention, employee wellbeing, diversity, safety, and loss control.

Working with insurance markets, governing boards, and leading a diverse group of professionals has led me to work with parties from different interest groups such as labor and management, where problem-solving and developing strategies keep school dollars in the classroom where they belong.

In April 2019, I received recognition as one of several Classified Leaders for (San Bernardino) Region 12; later recognized for excellence and commitment to public education, becoming the recipient of the coveted ACSA Administrator of the Year.

MARCO SANDOVAL

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

Experience/Titles Held:

- Risk Manager: included management of GL, Property, Loss Control, Crime, Pollution Liability, Automobile/Aviation Liability, Workers' Comp, Self-Insured Workers' Comp, and Employment Practices Liability programs
- Sr. Claims Representative

Education:

- BA: California State University, Long Beach - Long Beach, CA

Certifications/Licenses/Awards/Memberships:

- ARM
- PRISM:
 - * Board of Directors Committee
 - * Claims Review Committee
 - * General Liability 2 Committee
 - * Primary Workers' Compensation Committee
 - * Property Committee
 - * Underwriting Committee

Service Area		Rates (per hour)	Years of Experience
Claims Management	Liability Claims Manager	\$150-175	30
	WC Claims Manager	\$150-175	10
Risk Control	Safety & Loss Control Analyst II	\$150-175	25
Risk Management	Risk Manager	\$150-175	19
	Risk Analyst	\$150-175	19

Marco Sandoval is the owner of Diversity Risk Management Services, a consulting firm providing boutique risk management and loss prevention services customized for the individual needs of each client in both public and private sectors.

Work History:

I possess over 30 years of experience in Risk Management, Insurance, Loss Prevention and Safety in both the private and public sectors. Throughout my entire career in insurance and risk management, I have been involved in one aspect or another of implementing risk management and safety and loss prevention programs. In addition, I have experience in claims and litigation management; particularly with regard to workers' compensation and liability claims.

I was the designated ADA coordinator and HIPAA Compliance Officer at El Dorado County. I possess experience in detailed contract review and recommendations. Finally, I have direct working knowledge of PRISM operations as a result of being a Board Member for approximately the past 10 years.

Below is a list of the most recent positions I have held:

- Risk Manager, County of El Dorado
- Risk Manager, County of Sutter
- Risk Manager, Dole Food Company
- Associate Risk Manager, Amgen Inc.
- Sr. Claims Representative, ESIS, Inc.
- Liability Claims Representative, Workman's Auto Insurance Company

List of Consultants

MAURY DE BONT

Geographic
Area
Preferred:
ANY (remote
preferred)

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Edison International
(Insurance Risk Management)
 - Senior Adviser & Risk Manager
- Sempra Energy
 - Director, Insurance & Risk Advisory
- Mitsubishi Motor Sales of America
 - Senior Risk Management

Education:

- BS, Business Administration/Finance,
CSU Long Beach
- Associate in Risk Management (ARM)

Certifications/Licenses/Awards/ Memberships:

- BioCollaborative Life Science
Immersion Program (LSIP) Certificate
- OIL Technical Accreditation (OTA)
Certification
- Risk & Insurance Management Society
(RIMS) - Claims Management
- RIMS Fellow Workshop: ERM
Developing & Implementing Workshop
- RIMS CourseCast: Casualty Claims
Handling Techniques - Module 3:
Insurance Law: Claims Management -
Certificate of Completion
- CPCU Designation (In Progress)
- Past President, RIMS Orange County
(CA) Chapter

Service Area		Rates (per hour)	Years of Experience
Risk Management	Risk Manager	\$175-200	34
	Project Manager	\$175-200	28

Work History/Experience:

I have been a “risk manager” for two Fortune 300 companies in my career, I have a broad as well as deep based background. The role as risk manager makes me easily suited to be a consultant serving clients, as that is what I did for over 28 years at Sempra Energy and Edison.

My specialty is helping client and company leaders at all levels make better business decisions that protect their enterprise by mitigating risk and loss while achieving their goals and objectives.

As a consultant, I am best suited to provide services for member’s “overload” type of work - contract review of agreement insurance requirement clauses, P&C insurance review and analysis, certificate of insurance review for contractual compliance. These types of services I have provided for the past five years as an independent (1099) consultant, serving other consulting firms. It was a natural fit as I can provide these services during my off-hours (nights, and weekends), which do not require me to be client-facing during the workday week . I am full-time employed still, and thus I have limited hours to be client-facing. Hours of availability for projects include: noontime, before 8:00 a.m. and after 4:30 p.m. PST.

My professional Insurance and Risk Management skills and experience span many areas: designing and procuring corporate-wide operational property & casualty insurance/treaty reinsurance programs, construction project, and OCIP insurance placements within the utility and energy sector. I have ample experience developing and presenting insurance renewal presentations in the U.S., Bermuda, and London marketplace. I am also highly skilled in managing insurance broker services (Marsh, Willis, Aon; and brokerages in Bermuda, London, Mexico, Peru, and Chile), directing and negotiating property insurance claim settlements, completing insurance budget forecasts and allocations, negotiating contractual insurance requirements, certificate of insurance compliance, and developing and educating internal clients about risk management, insurance, and risk analysis.

Core Competencies include: Risk Management | Insurance Contract Analysis/Negotiations | Policy Review | Broker Services Management Claims | Certificate of Insurance Compliance | Project Management

NORMAN PETERSON

Geographic
Area
Preferred:
COUNTRYWIDE

Assignment
Length
Preferred:
1 WEEK +

Experience/Titles Held:

- President and owner of Norman Peterson and Associates, where I provide management services and develop return-to-work programs for public and private entities, while also marketing the company and supervising 22 employees.
- President of FEEL, an alternative energy group. Supervised staff of 25 paid employees and 50 volunteers.
- Professor of Political Science at Southern Oregon University
- Director of think tank at Lockheed Missile and Space Company

Education:

- ABD PhD - University of Oregon
- MPA - San Jose State University
- BS Political Science - Southern Oregon University

Service Area		Rates (per hour)	Years of Experience
Return-to-Work	<ul style="list-style-type: none"> • Analyze, interpret and report on time loss data • Provide ideas for ways to improve return-to-work programs already in place • Develop individualized return-to-work program for organizations that don't have a program currently • Provide regular program performance meetings 	\$125 - \$150	35
Critical Claims Management	<ul style="list-style-type: none"> • Train groups on techniques of critical claims • Management for indemnity claims • Facilitate meetings to establish plans for each critical claim • Track goals and progress 	\$125 - \$150	35
Provider Selections	<ul style="list-style-type: none"> • Serve on committees to select various vendors, TPAs, clinics, network providers, lawyers, etc. 	\$125 - \$150	35
Americans with Disabilities Act and Health Insurance Portability and Accountability Job Development	<ul style="list-style-type: none"> • Help develop job descriptions for use in ADA and HIPAA, both in-person and telephonically 	\$125 - \$150	20

REANETTE FILLMER PHR, CLRM

Geographic
Area
Preferred:
NORTHERN
CALIFORNIA,
VIRTUAL &
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- HR Consultant/Speaker/Leadership Trainer
- Chief Administration Officer
- Human Resources Director and Payroll and Benefits Manager

Education:

- Bachelor in Public Administration (HR Management): Chico State University, Chico, CA

Certifications/Licenses/Awards/

Memberships:

- DISC Certified - John Maxwell Certified Coach, Trainer, and Speaker
 - Previous Board Member:
1. Tehama County Employer Advisory Board (2008-2013)
 2. PRISM - Workers' Compensation Board Member (2008-2012)
 3. PRISM - Board Member (2009-2012)
- Professional Human Resources
 - HRCI
 - Calpelra Labor Relations Masters

Service Area		Rates (per hour)	Years of Experience
Human Resources	Human Resource Director	\$150-200	30
	Strategic Planning	\$200-250	20
	Training	\$150-175	25
Other	Negotiations	\$175-175	20
	Speaking	\$500-1000	25

Work History:

Veteran HR Expert:

- Boasting over three decades of HR experience, adept in aligning HR strategies with business objectives.
- Well-versed in modern HR practices, workplace diversity, and inclusion initiatives.
- Established in the private and public sectors to provide a rounded degree of knowledge and expertise.
- Chief HR, Director, and Consultant for interim positions and long-term.

Labor Relations Specialist:

- Negotiated multiple labor contracts, leading to enhanced productivity and reduced conflicts.
- Facilitated open communication channels between management and employees, ensuring a collaborative work environment.
- Grievance Resolution Guru:
- Efficiently managed and resolved complex employee grievances, focusing on fair and equitable solutions.
- Implemented grievance handling procedures that reduced case resolution times and improved employee satisfaction.

Leadership Excellence:

- Served in executive roles, steering companies through significant changes and expansions.
- Developed and executed strategic plans that resulted in measurable business growth and success.
- Human Resources Innovator and Strategic Thinker:
- Revamped talent acquisition processes, leading to a more skilled and diverse workforce.
- Introduced advanced performance management systems, enhancing employee engagement and productivity.

Executive Coach and Team Developer:

- Coached numerous executives, enhancing their leadership skills and decision-making abilities.
- Facilitated team-building workshops that improved team dynamics and collaborative efforts.
- Training and Development Architect:
- Designed and delivered custom training programs focusing on leadership, team performance, and personal development.
- Leveraged innovative training techniques to maximize learning and retention.

List of Consultants

REBEKAH WINGER

Geographic
Area
Preferred:
NORTHERN CA
and REMOTE

Assignment
Length
Preferred:
3 months
or less

Experience/Titles Held:

- Underwriting Manager
- Underwriting Analyst
- Accountant

Education:

- BA in Economics; Minor in Managerial Economics, UC Davis - Davis, CA

Certifications/Licenses/Awards/ Memberships:

- ARM-P
- Member Practices Committee - Association of Governmental Risk Pools (AGRIP): 2019- 2022
- Board Member/Treasurer - Emerging Insurance Professionals (EIP) Sacramento: 2018 – Present
- Enterprise Risk Management Training – Public Risk Management Association: completed in 2022

Service Area		Rates (per hour)	Years of Experience
Accounting/ Risk Finance	Budgeting Analyst	\$125-175	3
Risk Management	Risk Analyst	\$125-175	7
	Pool/JPA Administrator	\$125-175	7
	Underwriter	\$125-175	7

Work History:

As a former PRISM Underwriting Manager, I have expertise in pool administration, underwriting, and public entity risk exposures. I have assisted public agencies, from counties to special districts, with a broad range of risk management and insurance inquiries. I have provided consultation to agencies regarding their risk retention levels, risk transfer, cost allocations, and adding named insureds.

I oversaw the preparation and presentation of materials for five pool program committees and PRISM's Board of Directors. I can assist PRISM members with summarizing complex information for their governing boards and sharing technical information in clear, understandable presentations.

I have strong financial and data analysis skills from my prior experience as an accountant and an underwriting analyst. While working at PRISM, I analyzed claims data for many member entities and managed complex cost allocation models. With my advanced excel skills and experience developing technical reports, I can help PRISM members quickly complete their projects involving financial or claims data.

It was a pleasure working with and serving PRISM's members while I was part of the pool staff and I welcome the opportunity to continue working with PRISM members in a consulting role.

ROBERT ROMERO

Geographic Area Preferred:
SOUTHERN CA

Assignment Length Preferred:
1-6 MONTHS

Experience/Titles Held:

- Sr. Loss Control Consultant - Keenan
- Safety/Loss Control Manager - CSJPA
- Director of Risk Management - Snowline Joint USD

Education:

- AS in Occupational Safety & Health: Columbia Southern University - Orange Beach, AL

Certifications/Licenses/Awards/

Memberships:

- Associate in Risk Management (ARM)-P
- OSHA/Cal-OSHA Authorized General Industry Trainer: 10- and 30-Hour Courses (2023)
- Certified Trainer Forklift, Aerial Lift (MEWP), Rough Terrain Forklift (2023)

Service Area		Rates (per hour)	Years of Experience
Risk Control	Safety & Loss Control Analyst II	\$100-175	24
Risk Management	Risk Manager	\$90-150	13

Work History:

I have over 25 years of experience in Safety Management, Risk Management, and Loss Control in both private and public sectors, specifically in Public School and Community College settings. Across my career in Safety and Loss Control, I have developed and implemented risk management techniques, safety and loss control programs and procedures, investigative practices, and statistical data analysis. My experience also includes the ability to provide annual training programs for high-risk groups such as Maintenance and Operation, Custodial, Child Nutrition Services, and Special Education. I am able as well to train both Federal and CalOSHA safety programs as an OSHA Authorized General Industry Trainer, authorized to conduct 10 and 30-hour General Industry courses. I am also a Certified Forklift and Aerial Lift (MEWP) trainer.

Experience:

- Director of Risk Management at a K-12 Joint USD
- Development and coordination of regulations, policies, programs and services related to safety and risk management including the ability to interpret regulations, policies, laws, and contracts.
- Aiding in the implementation of safety and loss control, regulatory compliance, and risk management programs, including indoor air quality issues.
- Ability to Investigate and make recommendations for appropriate risk mitigation techniques.
- Ability to provide recommendations for improvements to current safety, loss control and risk management processes.
- Ability to assist in the day-to-day operation of safety and risk management programs.
- Ability to communicate effectively with a wide variety of personnel.
- Ability to conduct job safety training, job hazard analysis, and P/L inspections.
- Ability to provide written and photographic documentation of safety inspections.
- Ability to develop and analyze statistical data for loss trends and mitigation strategies, and proactive solutions to current trends.
- Ability to assist and participate in the development and creation of Safety Committees, Ad Hoc, and Focus Groups.
- Managed Risk Management/Loss Control staff; provided leadership, guidance and training.

List of Consultants

DR. SCOTT MANN

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles

Held:

Public Sector

- City of Pasadena – ERM Consultant
- City of Sunnyvale – Risk Manager (RM)
- Moreno Valley USD – Director of RM & Benefits
- City of Palm Springs – ERM Consultant
- Del Mar School District – CBO
- Menifee School District – Director of RM
- Big Bear Airport District – RM Consultant
- Hope Learning Academy – CBO
- City of Gardena - ERM Manager

Private Sector

- West Coast Painting & Drywall – HR Director
- The Lucas Group – Executive Recruiter
- B&M Associates – Tech Recruiter
- Volt Services Group – Tech Recruiter
- Manpower West - Director, Risk Management
- Adjunct Professor, Cal Baptist University, School of Arts and Sciences

U.S. Navy

- Assistant Chief of Staff for Personnel Administration
- Lieutenant Commander / Senior Chief Personnel Specialist

Education:

- Doctorate – DPA, California Baptist University, Riverside, CA
- Masters – MBA, National University, La Jolla, CA
- Bachelors – BBA, National University, La Jolla, CA

Service Area	Rates (per hour)	Years of Experience
Enterprise Risk Management (ERM)	\$185-250	37
Human Resources Management	\$185-250	37

Work History

Dr. Mann is the President and CEO of Mann Consulting, providing a diverse array of business services to public and private sector clients in the areas of enterprise risk management, finance, strategic planning, succession planning, organizational development, capital improvement, grant writing, safety, and loss control. He has over 35 years of leadership experience with a solid history of success in public agencies, private business, and military environments.

Highlights of Experience include:

- Strategic Business Planning
- Team Building and Leadership
- Staff Training and Development
- Recruiting and Staffing Initiatives
- Contract Development / Negotiations
- Safety & Loss Control
- Budget Administration and Management
- Benefits Administration
- Property & Casualty Administration
- Workers' Compensation Administration
- Regulatory Compliance
- Occupational Safety & Health Training

Service on Boards and Commissions include:

- Commissioner, Riverside County Transportation Commission
- Board of Directors,
 - Western Riverside Council of Governments
 - Riverside County Workforce Investment Board
 - PRISM JPA (formerly CSAC EIA)
 - CA Joint Powers Risk Management Authority (CJPRMA)
 - Statewide Education Wrap-Up Program (SEWUP)
 - Southern California Relief (SCR) Joint Powers Authority
 - Public Agency Risk Management Authority of CA (PARSAC)
 - Riverside Schools Risk Management Authority (RSRMA)
 - Riverside Schools Insurance Authority (RSIA)
- Chairman of the Board, Quail Valley Environmental Coalition

Certifications

- Senior Executives in State & Local Government, Harvard Kennedy School
- Associate in Risk Management (ARM), The Institutes
- Chief Business Officer (CBO), USC – Rossier School of Education

List of Consultants

SHEILA SHANAHAN

Geographic Area Preferred:
NORTHERN/SOUTHERN CALIFORNIA & VIRTUAL

Assignment Length Preferred:
ANY

Education:

- University of Nebraska - BS in Elementary Education
- California State University, Fullerton - Certificate in Human Resources Management

Service Area		Rates (per hour)	Years of Experience
Risk Management	Risk Manager	\$125-150	25
Risk Control	Safety & Loss Control Analyst II	\$125-150	15
Claims Management	Liability Claims Manager	\$125-150	15
	Litigation Manager	\$125-150	25
	WC Claims Manager	\$125-150	25
	Return-to-Work Coordinator	\$125-150	25
Human Resources	Health & Benefits Manager	\$125-150	10

Work History:

Sheila is a passionate Risk and Safety Manager with 8 years of experience in the Public Sector and 20 years in the Private Sector as well as 5 years of experience as a Human Resources Manager. Her private sector experience includes work in various industries including home interior design/construction, healthcare (hospitals) and skilled nursing, and a national retailer. Sheila's experience and skill set includes the following:

- Strategic Business Partner
- Team Building and Leadership
- Staff Training and Development
- Budget Administration and Management
- Contract and Insurance Administration
- Benefits Administration
- ADA Interactive Process
- Safety and Loss Control
- Workers' Compensation Administration
- Property and Casualty Administration
- Claim and Litigation Management
- Regulatory Compliance
- Occupational Safety and Health Training

List of Consultants

SHERRI ADAMS

Geographic
Area
Preferred:
COUNTRYWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Risk Manager - responsible for insurance programs: WC, Liability, Property, Cyber Liability, Fiduciary Liability (crime bond), Med Mal and Watercraft
- Sr. Account Manager - managed WC Administration program for 21 public entity clients, data analysis for trending and development, assisted in preparation/presentation of RFPs
- Principal Risk Analyst - tasks included development and training of County's IIPP

Education:

- BS in Administration: San Jose State University - San Jose, CA

Certifications/Licenses/Awards/ Memberships:

- Associate in Risk Management (ARM)
- Workers' Compensation Certificate of Administration (WCCA)
- Essentials in Risk Pool Management
- EAGLE Award Recipient (2018):
* *Know Your Numbers*
* *Ergo Express Program*

Service Area		Rates (per hour)	Years of Experience
Claims Management	Return-to-Work Coordinator	\$100-125	12
Risk Control	Safety & Loss Control Analyst II	\$75-100	14
Risk Management	Risk Manager	\$100-125	7
	Risk Analyst	\$100-125	14

Work History:

I started my career in Risk Management with Del Norte County. Over the last 14 years, I have worked in risk management for both small and large counties, a third-party administrator and a transit district. I have held the position as Risk Manager for Sutter County, Sacramento Regional Transit District and Solano County.

In Solano County, I was responsible for the Risk Management Division of Human Resources. This includes insurance, both self-insured and fully insured, safety /loss control, DOT compliance, pre-employment physicals, fit-for-duty, disability management, employee wellness, insurance requirements in contracts and training on risk programs.

I was appointed to the PRISM Board of Directors and have served as a Board Member for over 10 years. Over this time, I have been a member of the Risk Control Committee (Chair), Member Services Committee (Chair), and Medical Malpractice Committee and Claims Review Committee. I was also an elected member of the PRISM Executive Committee in 2018 and again in 2020.

List of Consultants

SOPHIA R. MEYER

Geographic Area Preferred: NORTHERN CALIFORNIA & VIRTUAL

Assignment Length Preferred: ANY

Education:

- Cal Northern School of Law - Juris Doctorate - Passed the July 2011 Bar Exam
- California State University, Chico - Bachelor of Science with an emphasis of Marketing/Management

Specialized Trainings:

- CalPERA Annual Conference - 2016, 2017, 2018, 2019, 2020, 2021
- Northstate SHRM - Creating Sustainable Work Environment: March 2022
- SHRM Annual Conference - June 2022
- California Grand Jury Association training: July 2016
- CalPERA Labor Relations Masters (CLRM): November 2018
- Introduction to Incident Command System: January 2015

Service Area		Rates (per hour)	Years of Experience
Human Resources	Human Resources Director	\$200-250	8
Other	Contract Review	\$200-250	12
	Chief Executive Officer/City Manager	\$200-250	8*
	Skelly Officer	\$200-250	9

* - Did not officially hold title, but could perform the job at that level

Work History:

Sophia R. Meyer is an accomplished attorney with over ten years of experience in Municipal Law representing multiple Counties, Cities, Special Districts and Public Agencies in a variety of legal matters. Ms. Meyer's current clients include Butte County Department of Employment and Social Services, the City of Red Bluff, Chester Public Utilities District, Alpine County Health and Human Services, and Southern Cascade Communities Service District.

Ms. Meyer has worked within the public agency field as an employee and as an attorney and her unique understanding of the inner-workings of government coupled with her skills and abilities qualifies her to offer her expertise in the services areas offered above.

STEPHEN HACKETT

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Napa County Safety Officer (2006 - 2015)
- Fire Captain: CA Department of Forestry and Fire Protection (1990 - 2005)
- Fire Apparatus Engineer: CA Department of Forestry and Fire Protection (1986 -1990)
- Firefighter: City of Napa (1983 -1986)
- EMT: Piners Ambulance Service in Napa: (1982 -1983)
- Firefighter (Seasonal): CA Department of Forestry and Fire Protection (Summers: 1979, 1980,1981,1982)

Education:

- MPA: University of San Francisco - San Francisco, CA
- BA, Political Science (Public Service): UC Davis - Davis, CA
- AS: Fire Science & AA: Natural Science - Napa Valley College, Napa, CA

Certifications/Licenses/Awards/ Memberships:

- Public Agency Safety Management Association (PASMA) - Member-at-Large
- National Safety Management Society (NSMS) - retired
- County Safety Officers Organization of California (CSOOC) - retired
- Wine Industry Officers of Safety (WINOS) - retired

Service Area		Rates (per hour)	Years of Experience
Risk Control	Safety & Loss Control Analyst II	\$150	39+

Work History:

As the Napa County Safety Officer, from March 2006 through December 2015, I administered the County of Napa's Safety Program. My responsibilities included: managing the injury and illness prevention program, coordinating & providing employee safety and SEMS (Standardized Emergency Management System) training, performing facility fire & safety inspections, working with staff, management and cooperators (contractors & agencies) in order to create a more compliant and safe working environment. I provided ergonomic evaluations and gained experience with Cal OSHA interactions & investigations. I have experience in operating in highly dynamic situations, including emergencies and disasters.

While in the Fire Service (1979 - 2005), I responded to numerous emergencies & disasters (fire, flood, medical aids, hazardous materials incidents etc...). I supervised and managed staff in both emergency & non-emergency situations, maintained equipment & facilities, provided training to employees and public, performed fire inspections, developed and implemented facility IIPPs (Injury Illness Prevention Program) and was a hazardous materials specialist while response team member.

I was a member of four professional safety organizations: PASMA (Public Agency Safety Management Association), NSMS (National Safety Management Society), CSOOC (County Safety Officers Organization of California), and WINOS (Wine Industry Offices of Safety). I was most active in PASMA, North Chapter, (2007 - Present); I was the Chapter Vice President in 2012 - 2013 and President 2013 through 2018.

List of Consultants

STEVE WILMES

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Wilmes, LLC - Risk Control Services - CEO
- Alliance of Schools for Cooperative Insurance Programs (ASCIP) - Principal Risk Services Consultant
- Poms & Associates - Risk Management Specialist
- Countrywide Financial Corporation - Corporate Safety Manager

Education:

- BS, Criminology and Criminal Justice - University of Missouri, St. Louis, MO

Certifications/Licenses/Awards/Memberships:

- ASSE Valley Coast Chapter - Past President, Vice President, & Newsletter Editor
- California State University - Criminology Adjunct Instructor
- Speaking Engagements for Conferences: Cal-PRIMA, PARMA, WeTip, CAJPA, AGRiP

Service Area		Rates (per hour)	Years of Experience
Claims Management	WC Claims Manager	\$165	20
	Return to Work Coordinator	\$165	20
Risk Control	Safety & Loss Control Analyst II	\$165	20
Risk Management	Risk Analyst	\$165	20

Work History:

Steve Wilmes has worked in the world of risk management for more than 20 years - working specifically with public agencies for the last 11 years. Understanding public agency environments is a unique task. Gaining the trust of unions, Board and Council members, employees and the community is paramount to a successful risk control program. Steve understands these relationships and is able to leverage them to your entity's advantage.

In 1998, Steve moved to Omaha, Nebraska and worked in the claims department at Mutual of Omaha and later as the Corporate Safety Director. Gaining an understanding of the claims operations, Steve was asked to assist in a startup known as The Alliance Group, Inc. - a professional employer organization. It was here that Steve cemented his career in risk management and risk control.

Steve became responsible for worker's compensation, human resources and safety for 150 high hazard companies, such as nuclear power plant cleaning companies, ammunition manufacturers, chemical manufacturers, recycling plants and many others. From this experience, Steve obtained his Professional in Human Resources (PHR) designation in 2001.

Steve later moved to California, where he became the Corporate Safety Manager for Countrywide. He designed data systems and oversaw all of the safety operations for the United States.

After living the corporate life, Steve dedicated his work to the public sector as the Principal Risk Services Consultant for the second largest Joint Powers Authority in the United States. He oversaw the Loss Control Department for 140+ school districts, handling everything from safety audits, security audits, emergency prep audits, ergonomics, industrial hygiene to OSHA inspections.

Steve is currently based in Redondo Beach, and supports cities and schools districts throughout the state of California.

TOM PHILLIPS

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 WEEK +

Experience/Titles Held:

- Risk Manager Experience with City, County, School and Transit Districts
- Worked for Liberty Mutual as a multi-line claims supervisor for commercial risks involving retail, construction and manufacturing operations

Education:

- ARM: Insurance Institute of America
- BS, Political Science/History: California State University Fullerton - Fullerton, CA
- American Institute for CPCU - Charter Prop. Casualty Underwriter

Certifications/Licenses/Awards/

Memberships:

- RIMS, PRIMA, PARMA and MISC Seminars and Conferences
- PRIMA National President: 1990-91
- ACCEL President: 1989-90, 1995-97, 2002-04
- ASCIP Executive Committee: 1984-86
- PRISM Committees: Board, CPEIA, Legislative & Property
- IEA Instructor: Risk Management Courses

Service Area		Rates (per hour)	Years of Experience
Claims Management	Litigation Manager	\$165-200	25+
Risk Management	Risk Analyst	\$165-200	25+
	Risk Manager	\$165-200	40+

Work History:

40+ Years in public entity risk management. Worked for four different types of public entities: transit district, school district, municipality and county. Responsible for all areas of risk management including self insurance/ insurance procurement, claims and litigation management for both self-administered programs and outsourced claims service providers, contractual risk transfer requirements in contracts, occupational safety and health programs, budgeting, cost allocation, risk funding policy and general risk consultation services to agency departments.

Leader in the risk management industry, served as National President for the Public Risk Management Association, contributing author for the IEA risk management textbook for public entities, founding member and Past President of the Authority for California Cities Excess Liability JPA. Involved in the early stages of public entity involvement in PRISM and served on the CPEIA Board prior to consolidation, served on PRISM's Property and Legislative Committees.

TRELAWNEY "TJ" KITCHEN

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 WEEK +

Experience/Titles Held:

- Attorney
- Senior Associate/Associate
- Corporate Counsel

Education:

- J.D., Golden Gate University, San Francisco, CA
- B.S., Economics, Iowa State University, Ames, IA

Certifications/Licenses/Awards/

Memberships:

- Member, California Bar Association (Active)
- Member, Nevada Bar Association (Active)
- Member, Arizona Bar Association (Inactive)

Service Area		Rates (per hour)	Years of Experience
Claims Management	Liability Claims Manager	\$150-175	25
	Litigation Manager	\$150-175	25
Risk Management	Contract Review	\$150-175	25

Work History:

Claims handling experience as an insurance coverage attorney working with insurers and policyholders, including public entities and insurers providing coverage to public entities:

- Resolve high exposure and/or difficult claims involving personal injury, sexual harassment, housing and employment discrimination, habitability, automobile and trucking, construction defect, pollution product liability, employment, premises liability, technology errors and omissions and professional liability.
- Analyze Self Insured Retention issues;
- Perform file review and fact investigation;
- Provide coverage review and analyses;
- Identify risk transfer opportunities.
- Tender to insurers providing direct and additional insured coverage and pursuing them when coverage is denied but owed.
- Tender to parties under indemnification provisions;
- Evaluate liability and coverage issues to determine value of case;
- Negotiate allocation issues among responsible parties on defense and indemnity;
- Negotiate settlements;
- Appear at mediations and Mandatory Settlement Conferences in California, Nevada, and Arizona.

Litigation and litigation management experience:

- Recommended defense counsel;
- Worked with defense counsel to establish litigation plans and budgets;
- Monitored litigation to ensure it was efficient and cost effective with an eye toward early resolution;
- Reviewed defense bills to ensure charges were necessary and appropriate;
- Appointed by insurers to defend their insureds in liability lawsuits;
- Brought and defended insurance coverage actions on behalf of policyholders and insureds;
- Personally participated in every stage of litigation as counsel of record.

Contract review experience:

- Conducted contract review and negotiations of a variety of commercial agreements, including technology and services, construction, and lease and professional service agreements with the objective of limiting risks, maximizing risk transfer opportunities, and assuring enforceable contracts.
- Routinely identified contract deficiencies, including problematic scope of indemnity provisions; indemnities that are against public policy or violate anti-indemnity statutes; inadequate insurance requirements; and additional insured requirements that are inadequate or conflict with the indemnification requirements.

List of Consultants

KRISTIN MCMENOMEY

Geographic
Area
Preferred:
NORTHERN CA

Assignment
Length
Preferred:
3 MONTHS OR
LESS

Experience/Titles Held:

- General Services Agency Director
- Deputy CEO
- Risk Manager

Education:

- BA, Liberal Studies: Sonoma State University - Rohnert Park, CA

Certifications/Licenses/Awards/ Memberships:

- ARM
- PRISM Committees: Board of Directors, CPEIA Board of Directors, Executive, Legislative, Primary Workers' Compensation, Technology
- PRISM Sub-Committees: Governance and Personnel

Service Area		Rates (per hour)	Years of Experience
Claims Management	Litigation Claims Manager	\$65-150	16
	Return to Work Coordinator	\$65-150	8
Human Resources	Facilities Management	\$65-150	8
Risk Control	Chief Risk Control Officer	\$65-150	16
Risk Management	Risk Manager	\$65-150	16
	Project Manager	\$65-150	16

Work History:

My professional experience consists of working for the County of Mendocino from April 1994 to August 2015. During my tenure with the County of Mendocino, I was the General Services Agency (GSA) Director/Risk Manager for eight years. Before becoming the GSA Director I served as the Risk Manager for an additional eight years.

I was very much involved with PRISM serving on several Committees including the following: Board of Directors from 1999-2015, Executive Committee from 2002-2008 and 2010-2015, Primary Workers' Compensation Committee from 2000-2015, Technology Committee from 2002-2005, Legislative Committee from 2006-2007, and served as Vice-President of the Board of Directors in 2015.

I resigned from the County of Mendocino in August 2015 in order to assist my husband in the pursuit of expanding our personal vineyard business.

LARRY MOSS

Geographic
Area
Preferred:
NORTHERN CA

Assignment
Length
Preferred:
6 MONTHS OR
LESS

Experience/Titles Held:

- Risk & Safety Manager
- Manage Loss Control, Workers' Compensation, Contract Insurance and Risk Budgeting
- Emergency/Disaster Preparedness

Education:

- BA, Wayne State University
- Business Courses at UC Berkeley & Golden Gate University

Certifications/Licenses/Awards/Memberships:

- ARM
- President: PRISM, PARMA
- Vice President: CSOOC
- Chair of PRISM Committees: Legislative, Executive, Best Practices
- Chair: CIPRA, WCIRB Medical Care
- Director: CFSA

Service Area		Rates (per hour)	Years of Experience
Accounting/ Risk Finance	Budgeting/ Analyst	\$100	25
Claims Management	Chief Claims Officer	\$100	25
	Liability Claims Manager	\$100	20
	Litigation Manager	\$100	25
	WC Claims Manager	\$100	25
Human Resources	Facilities Management	\$100	10
Risk Management	Risk Manager	\$100	20
	Risk Analyst	\$100	3
	Project Manager	\$100	20

Work History:

I have 28 years of experience in public entity risk management for counties, cities, and special districts. Managed in-house and 3rd party claims for workers' compensation and liability. Settled claims up to \$20M, property losses up to \$15M and managed funds and budgets up to \$90M.

Experienced with managing funds, losses, evaluating self-insurance retentions and insurance programs, as well as, unemployment, hazardous materials, emergency management and contracts. Have produced manuals for contracts and used in-house as well as contract software. Experienced in consulting, negotiating, writing Board material, managing, and collaboration.

Most rewarding experiences: helping to train staff: (i.e. took an inexperienced person and trained her to succeed me, oversaw a mentoring program for PARMA), participating in PRISM committees (Executive, Legislative, Best Practices) and adapting streamlining programs by using technology as well as common sense, best practices, and creative thinking.

I have also taught a variety of risk related subjects to risk professionals at professional conferences and other venues.

ANN RICHEY

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
6 MONTHS+

Experience/Titles Held:

- Risk Management Director
- Loss Control Analyst
- Buyer
- Implemented Emergency Preparedness and Business Continuity Program with Fire Department
- Implemented programs, such as; DMV Pull Notice Program
- Worked with State of CA to develop Bloodborne Pathogens regulations
- Worked as Management Assistant in Budget Office
- Experienced with contract language and indemnity loopholes
- Trained in Total Quality Service and organizational development

Education:

- BS, Occupational Health & Safety - La Salle University

Certifications/Licenses/Awards/

Memberships:

- ARM-P
- PRISM Committees: Board of Directors, Executive, Underwriting, and Member Services
- ACCEL Committee: Executive

Service Area		Rates (per hour)	Years of Experience
Risk Control	Chief Risk Control Officer	\$125-145	15
	Safety & Loss Control Analyst	\$110-125	25
Risk Management	Risk Manager	\$125-145	15
	Risk Analyst	\$125-145	25

Work History:

I am looking to apply my advanced risk management skills in an organization in order to create a solid infrastructure that minimizes losses and maximizes the overall experience for customers, vendors and employees.

I have a broad knowledge of many facets of large organizations; having worked for public agencies in departments such as Purchasing, Budget Office and Risk Management and would like the opportunity to help bring my next employer to its fullest potential.

I have worked for four municipalities for the past 35+ years. For the first 10 years I was a Buyer for Anaheim, Cerritos and Santa Ana. I then worked 1 year in the Budget Office at Santa Ana before starting my Risk Management career in 1992. I was Santa Ana's Loss Control Analyst (safety manager) for 10 years, and then was the City of Ontario Risk Management Director from 2002 to 2017. I am currently serving as the Risk Management Director for the Ontario International Airport Authority.

I have experience with Cal/OSHA regulations and training, am an audiometric screener (I give hearing tests and can interpret the results as a layperson), I have managed safety committees and DMV programs including the Employer Testing Program, as well as the Pull Notice Program.

I manage a Workers' Compensation Program, having maintained a 2% litigation rate for the past 14 years. I also manage a third party liability claims program, including working directly with attorneys that I contract with. I have experience with handling Employee Benefits, including pulling the City of Ontario out of CalPERS.

List of Consultants

MICHAEL GROFF

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
6 MONTHS
OR LESS

Experience/Titles Held:

- Litigation Claims Manager for (4) Self-Insurance Pools, including CARMA
- Contractual Risk Transfer: recreational, construction risk, public works projects, waivers and releases

Education:

- BS, Oregon State
- MS, University of North Dakota
- JD, McGeorge School of Law

Certifications/Licenses/Awards/ Memberships:

- ARM
- State Bar (inactive)
- Speaker: CAJPA, PARMA Conferences
- ABOTA Associate (former)
- Presenter: Contractual Risk Transfer

Service Area		Rates (per hour)	Years of Experience
Risk Management	Risk Analyst	\$100-150	30

Work History:

I have over thirty (30) years of “hands-on” experience as a public entity defense trial lawyer representing counties, cities and special districts in both state and federal court. My prior legal experience and the ARM designation allow me to quickly see the real issues and effectively advise the agency or entity on its Contractual Risk Transfer needs. I can work remotely to respond to risk transfer questions quickly to minimize costs and expenses.

My experience includes:

- Former ABOTA Associate
- General liability claims adjusting with USAA, Allstate and the Auto Club of Southern California (including as a Liability Claims Supervisor and Manager)
- Litigation Manager at Bickmore for four (4) self-insured general liability pools
- Independent consultant advising public entities on Contractual Risk Transfer issues with a focus on indemnification language “as permitted by law” and the proper insurance requirements.

I maintain an inactive State Bar law license and have access to several on-line publications to assist me in my counsel and advice to public entities.

ERIC DAHLEN

Geographic
Area
Preferred:
SOUTHERN CA

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Owner/Consultant of Trident Risk Solutions, providing Risk Management Services and organization structure to a Joint Powers Authority in Southern California in the areas of Worker's Compensation, Property, and Liability lines of coverage.
- Director of Risk Management
- Emergency Planning and Preparedness Technician
- Director of Public Safety

Education:

- BA, Intelligence Studies, American Military University

Certifications/Licenses/Awards/ Memberships:

- Associates in Risk Management – The Institutes
- California POST Basic Police Academy – San Bernardino Valley College

Service Area		Rates (per hour)	Years of Experience
Risk Control	Safety & Loss Control Analyst II	\$90-140	20+
Risk Management	Risk Manager	\$90-140	5+
	Risk Analyst	\$90-140	20+

Work History:

Most recently, Eric has been instrumental in providing structure and consultative services in the areas of risk management, training, and claims management at a Southern California based JPA focused in the education field. Working primarily with K-12 and Community College Districts, Eric worked with a team of professionals to prevent incidents, mitigate losses, and manage claims to lower the overall exposure of JPA members. With his proven knowledge in risk management, Eric has also earned the Associates in Risk Management (ARM) designation.

Eric also has experience leading the re-shaping of the security department of a super-regional shopping center located in Los Angeles, CA. This effort resulted in saving the client several thousand dollars each year, while maximizing the company's profit margin – creating a win/win situation.

As far as project management skills are concerned, Eric has developed key strategies over time that have proven effective to keep efforts on time and within budget. Taking a notation on paper and leading through development and implementation is not only challenging, but rewarding at the same time.

With an extensive physical security background, Eric had earned the Certified Protection Professional designation through ASIS; of which he is working to re-certify.

JOHN GARGIULO

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Past Global Program Manager for Hewlett Packard Corporation
- Past OSHA Compliance and Consultation Officer
- University Instructor
- Published author in the field of Environmental Health & Safety (EHS)
- Past National Ergonomic Conference and Exhibition (NEC&E) Speaker
- EHS software development consultation

Education:

- MS, Health Science with Emphasis in Industrial Hygiene/Environmental Health, California State University - Fresno, CA
- BS, Biology, Washington State University - Pullman, WA

Certifications/Licenses/Awards/ Memberships:

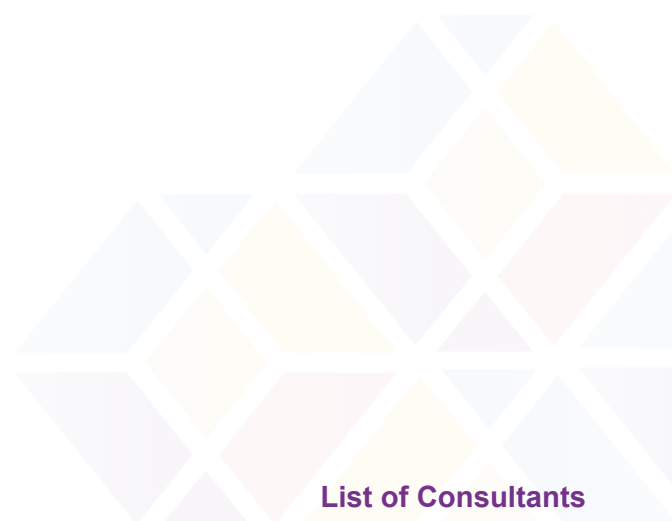
- Certified Industrial Hygienist (CIH)
- Certified Safety Professional (CSP)
- Past Chairman of the HP Industrial Hygiene Technology Council
- Past Project Manager for the HP Ergonomics Center of Expertise

Service Area		Rates (per hour)	Years of Experience
Risk Control	Safety & Loss Control Analyst II	\$100-150	37

Work History:

John offers a unique perspective in that he has worked in both private industry and in the public sector in a variety of industries. This experience allows him to understand the culture associated with both groups and to provide consultation that encompasses the best of both worlds. The result is consultation that is direct, cost efficient as possible and technically competent.

Having worked with hundreds of companies in his career, John is now available to provide assistance to PRISM members on a case by case basis.



List of Consultants

MARYELLEN PETERS

Geographic
Area
Preferred:
NORTHERN CA

Assignment
Length
Preferred:
6 MONTHS OR
LESS

Experience/Titles Held:

- Implemented Indemnification & Insurance Requirements Contract review program
- Created integrated disability management program for industrial & non-industrial leaves of absence
Results: 50% reduction in WC disability costs, 20% reduction in medical costs, & a 48% reduction in legal cost in the first 3 years
- Creation of an ADA Coordinator position to manage interactive meetings with departments and county-wide leave program

Education:

- BS, Niagara University

Certifications/Licenses/Awards/ Memberships:

- California Transit Indemnity Pool (CALTIP) Board Member
- Casualty Adjuster: Connecticut
- Executive Leadership Certificate, CSUS
- PRISM Committees: Board, Executive, GL2, Legislative

Service Area		Rates (per hour)	Years of Experience
Claims Management	Chief Claims Officer	\$175-200	38
	Liability Claims Manager	\$125-150	35
	Litigation Manager	\$125-150	35
	WC Claims Manager	\$125-150	38
	Return to Work Coordinator	\$100-150	22
Risk Control	Chief Risk Control Officer	\$175-200	20
Risk Management	Risk Manager	\$150-200	27
	Risk Analyst	\$125-150	38

Work History:

I began my insurance career with Liberty Mutual Insurance company managing Workers' Compensation, Liability and Property claims.

For the next 22 years I worked as a Risk Manager for The Hertz Corporation, Supermarkets General, as well as Executive positions in the insurance and TPA sectors with Home Insurance Co., HCM Claim Management (the largest administrator of WC claims in CA.), and Cambridge Integrated Services Group.

Following the acquisition of CISG by AON, I began a second career in the public sector with Placer County, recently retired as Deputy CEO. As Deputy CEO, I was responsible for the Risk Management Division, including Self Insurance Funds, Insurance purchasing (Medical Malpractice, Property, Pollution, Cyber, Aviation, Watercraft liability), Labor Relations, Organizational Development/ Training, Safety/ Loss Control, DOT compliance, Integrated Disability Management, and pre-employment background checks, Fit for Duty exams, and Employment Liability investigations. Responsibilities also included contractual risk transfer and insurance certificate tracking for all County contracts and budget strategy workshops.

The Board of Supervisors appointed me to the Board of Directors of both PRISM and CALTIP. My experience with PRISM's programs and pool structure, understanding the value of a member driven organization makes me uniquely qualified to act as a consultant for the County, Public Entity and School members of PRISM.

DIANNE HANSON

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 WEEK or
LONGER

Experience/Titles Held:

- Risk Management Consultant
- Director of Business Service/Risk
- Public Safety Officer/Emergency Preparedness
- Assistant Director - Nutrition Services
- Clinical Dietitian/Registered Dietitian/ Nutritionist

Education:

- BS, Nutritional Science/Dietetics - California State University, Los Angeles
- MS, Business Administration - Pepperdine University, Malibu

Certifications/Licenses/Awards/ Memberships:

- ARM
- State of California - Department of Insurance - Self Insurance Certificate
- Registered Dietitian - #579163
- Workers' Compensation Claims Administration

Service Area		Rates (per hour)	Years of Experience
Claims Management	Litigation Claims Manager	\$95-140	18
	Litigation Manager	\$95-140	18
	WC Claims Manager	\$95-140	18
Human Resources	Health & Benefits Manager	\$95-140	18
Risk Management	Risk Manager	\$95-140	18

Work History:

8 years – Clinical Dietitian: Acute care hospital setting

31 years – Public school setting

- 14 years – Dietitian/Assistant Director of Nutritional Services Department – Public Schools
- 14 years – Risk Management/Public Safety in Public Schools: Worker's compensation-self-insured/self administered program;large deductible, indemnity programs; Property/ Liability management; Employee Health Benefits management
- 3 1/2 years – Independent risk consultant for Public Schools

Complex liability claims management- sexual abuse, EPL, Property, Civil rights

Loss Control- annual training programs for high-risk areas (MOT, Nutrition Services, Special Education, OSHA compliance, mandated trainings

Emergency Preparedness – oversight and installation of online Rapid Responder program for all 70 school sites

Health Benefits management and oversight for 7500 employees - self-insured/self administered health plans – GGUSD. Self insured/ third party administrator for 1400 employees at HBUHSD

JOHN FALAPPINO

Geographic
Area
Preferred:
NORTHERN CA

Assignment
Length
Preferred:
6 MONTHS
OR LESS

Experience/Titles Held:

- Executive Director for large School Insurance Pool (Workers' Compensation, Liability and Employment Benefits)
- Interim CEO for statewide Excess Liability Pool
- Partner in large (over 50 employees) CPA firm
- Chairman of the Board of a large JPA

Education:

- BS, Accounting, University of California, Berkeley - Berkeley, CA

Certifications/Licenses/Awards/ Memberships:

- Certified Public Accountant (CPA# 27418) retired status
- Member of the CA Society of Certified Public Accountants
- Board member of \$80M credit union for 6 years
- Government Relations Committee member for CA Coalition of Workers' Compensation

Service Area		Rates (per hour)	Years of Experience
Accounting/ Risk Finance	Accounting/ Finance Manager	\$110-150	40
	Budgeting/ Analyst	\$110-150	40
Claims Management	Chief Claim Officer	\$110-150	25
Human Resources	Health & Benefits Manager	\$110-150	25
	Strategic Planning	\$125-150	25
Risk Management	Risk Manager	\$125-150	25
	Pool/JPA Administrator	\$125-150	25

Work History:

- 35+ years as an administrator for joint powers authorities and an accounting firm
- 25+ years in all phases of Risk Management
- Public, non-profit and private sector consulting in accounting, budgeting, management and human resources
- Prepared and revised Joint Powers Board handbook and Employee Handbook
- Experience in Workers' Compensation Programs, to include management of the program, implemented a Return-to-Work program for each school district, established MPN (Medical Provider Network), and clinic identification for Improved Medical Control and established a Critical Claims Committee for pro-active review of high risk claims
- Experience in Property/Liability Programs, to include management of the program, liability claims review, selection of defense attorneys, preparation of Insurance and Risk Management Manual for each member and development of Safety Credit Program
- Experience in Employee Benefits Programs (medical, dental, vision & life), to include management of the programs, preparation of detailed procedure manual for member's benefit coordinators and conducted open enrollment meetings

TODD HAINES, SHRM-SCP

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- VP of Human Resources for various industries: largest credit union in CA (Golden 1); leader long-term care pharmacy services (PharMerica Corporation); global leader in Coatings and Chemicals industry (AkzoNobel Inc.)
- Teaching Strategic HR - Sacramento State University

Education:

- Master's in Business Administration, City University, Vancouver, WA
- BA, Management of HR, George Fox University, Newberg, OR

Certifications/Licenses/Awards/ Memberships:

- Society of Human Resources Certificate (SHRM-SCP)
- Active Member of Sacramento Area Human Resource Association (SAHRA)
- Member of Society of Human Resource Management (SHRM)
- Board Member of American Heart Association - Go Red for Woman
- Sullivan University, Human Resource Advisory Board

Service Area		Rates (per hour)	Years of Experience
Human Resources (HR)	HR Director	\$95-\$125	25
	Health & Benefits Manager	\$95-\$125	35
	Strategic Planning	\$95-\$125	35

Work History:

My work experience consists of over 35 years of Human Resources experience. I have had the opportunity to work in several different industries to include retail, manufacturing, pharmacy, medical, finance and banking. I have extensive experience in working in both union and nonunion environments to include negotiations with European Work Councils (EWC). I am an extremely adaptable and able to adjust to any work environment. I can work with and relate to all levels of employees in an organization from C-Suite to front line employees. Working cross functionally is also a strength of mine. During my years of experience, I gained a variety of skills in HR. I am extremely proficient in the following areas: Diversity and Inclusion, Health and Safety, Leave Management, Workers Compensation, Performance Management, Change Management, Conflict Resolution, Employee Engagement, Employee Benefits, Investigations and Training.

Most recently, I served as the VP of HR for Golden 1 Credit Union. I have led a team of 35 employees in Payroll, Benefits, Compensation, Recruitment and Employee Relations. I work closely with the executive leadership team to address all HR related initiatives. I have been successful in improving employee engagement by over 9% in two years resulting in top of class for our industry. Reduced the company's workers compensation claims and MOD rate. I set the benefit strategy and did due diligence on different plan options. Served on the Leadership Committee to address the ever changing COVID-19 pandemic policies. I am trained in Prosci Change Management and have applied this methodology on numerous projects. I recently completed a large Human Resource Information System (HRIS) implementation where I was the executive business owner, this included 13 HR modules. The system was rolled out successfully this summer. This project was on time and under budget. We also introduced a new mobile application for our employees that integrated with the new HRIS.

The banking industry is highly regulated which requires me to work collaboratively with our Risk and Compliance departments to address new or existing regulations. I served on the Leadership Committees for both these areas which meet monthly. My previous role also requires me to work very closely with our loss prevention area as it related to employee issues and conduct investigations when needed.

List of Consultants

CRAIG WHEATON

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 WEEK -
1 MONTH

Experience/Titles Held:

- Sr. Litigation Manager - several Pools
- AVP, Field Services Manager

Education:

- Commissioned US Navy Officer - Officer Candidate School, US Navy - Newport, Rhode Island
- JD, Lincoln Law School, Sacramento, CA
- BA, Criminal Justice Admin - University of Mansfield, Mansfield, PA

Certifications/Licenses/Awards/Memberships:

- Associate in General Insurance - AIN 21, 22 & 23
- Elected School Board Member - Placer Hills Union School District
- Board member/President - Our Savior Lutheran Church
- Board member/President - Acres of Hope (women's rehabilitation program)
- Board member/President - Colla Voce Chamber Choir

Service Area		Rates (per hour)	Years of Experience
Claims Management	Chief Claim Officer	\$100-115	5
	Liability Claims Manager	\$100-115	12
	Litigation Manager	\$100-115	4

Work History:

Craig began working liability claims in 1985 as a ground-level adjuster, adjusting first and third party automobile losses. Within the next 14 years, he managed USAA's loss report unit, traveled to four USA cities as a catastrophic adjuster (hail storms, Hurricane Andrew), and advanced to a Bodily Injury adjuster.

While employed, he attended Lincoln Law School (evening classes) and obtained a Juris Doctorate Law Degree in 1998.

In 1998, Craig moved to Civil Service Employees (CSE) Insurance company, employed first as a Bodily Injury Unit Manager and then CSE's Senior Litigation desk.

In 2003, an opportunity as a Unit Manager with Gregory B. Bragg and Associates presented itself. It was his first introduction to the public entity claims world. Gradually, he assumed oversight as Claims Manager of six public entities and three stand-alone clients.

York Risk then purchased Bragg and Associates. In addition to continuing with the Claims Management work, he also assumed the management of York's Western USA property and liability field adjusters.

In 2015, Bickmore Risk Services offered him the opportunity to assume the advanced position of Litigation Manager, first for a Southern California pool, ICRMA, and then for four Northern California pools: BCJPIA, ABAG/PLAN, VCJPIA, and CARMA (excess pool).

During his career, he handled everything from the simple non-litigated liability losses to the complex and costly litigated liability losses. Craig has come to appreciate the value of ADR settlements and the sometimes necessity of defining trial verdicts. He also appreciates the need to share lessons learned with claims adjusters, managers, and pool Board members. And lastly, he has come to appreciate the simple satisfaction of a client well served.

BARBARA LUBBEN

Geographic Area Preferred:
NORTHERN CA

Assignment Length Preferred:
6 MONTHS OR LESS

Experience/Titles Held:

- Finance Manager
- Actuarial Consultant
- Research Manager
- Director of Risk Management
- CAO's Budget Analyst

Education:

- Masters in Business Research – Stanford University, Graduate School of Business, Palo Alto, CA
- Masters in Social Sciences – University of Chicago, Chicago, IL
- Bachelors in History – Lake Forest College, Lake Forest, IL

Certifications/Licenses/Awards/Memberships:

- Certificate in Corporate Finance with Distinction - UC Berkeley Extension
- PRISM:
 - * President, Vice President: Personnel and Governance Sub-Committees
 - * Executive & Property Committees Member: Treasurer, EIO
 - * Chairperson: Finance & GL2 Committees

Service Area		Rates (per hour)	Years of Experience
Accounting/ Risk Finance	Accounting/ Finance Manager	\$125-150	20
	Budgeting/ Analyst	\$125-150	25
Risk Management	Risk Manager	\$150	12

Work History:

I have held senior roles in both risk management and finance and can assist members in promoting the financial stability of their programs.

Critical areas in which I can assist members include developing their budgets and cost allocations, preparing CAFR exhibits and footnotes, designing internal financial controls, and communicating funding needs to decision makers. I can also develop entity-specific budgeting and cost allocation tools and documents to institutionalize the processes.

Financial management tools and communications I've developed for other organizations include budgeting and cost allocation manuals and programs, a "Citizens' Guide to the Budget", EXCEL-based budgeting software, brochures for patient financial counseling, summary retirement plan descriptions, and studies of health benefits offered by local employers for labor and provider negotiations.

My technical strength comes from a blend of education and experience. I earned an MA in Business Research from Stanford University and recently passed the CPA exam. Prior to entering the public sector, I worked as an actuarial consultant for KPMG and as a cost accountant and research manager.

As Director, Risk Management for Alameda County for over a decade, I brought financial stability to its self-funded liability and workers' compensation programs, while implementing new programs designed to control losses, particularly in the areas of wellness and construction risk management.

Prior to becoming Director, I served as the County Administrator's Office Budget Analyst for the \$400 million Health Care Services Agency, on the finance team for the General Services Agency, and as an operational auditor for a large transit agency.

Governance roles at PRISM include: President, Vice-President, Chairperson of the Finance and GL2 Committees, member of the Property and Executive Committees, and Treasurer of EIO.

List of Consultants

JACK BLYSKAL

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 WEEK-
1 MONTH

Experience/Titles Held:

- Supervisor, Claims Manager, & Chief Claims Officer
- Worked in multi-lines claims environment for over 43 years
- Experience includes adjusting Auto, General Liability, Property and Workers' Compensation claims
- Taught AIC & CPCU classes 17 yrs
- Project development
- RFP development & selection
- Coverage analysis
- Training & public speaking

Education:

- Master of Arts, Organizational Management: University of Phoenix - Scottsdale, AZ
- BA, English: Bucknell University - Lewisburg, PA

Certifications/Licenses/Awards/ Memberships:

- ARM
- AIC & CPCU
- AIS
- SCLA

Service Area		Rates (per hour)	Years of Experience
Claims Management	Chief Claim Officer	\$120-150	11
	Liability Claims Manager	\$85-110	13
	WC Claims Manager	\$85-100	3

Work History:

Jack has over 44 years of claims experience in the areas of:

- Auto
- General Liability
- Workers' Compensation
- Property
- Medical Malpractice
- Subrogation and
- Auditing

His experience and titles he's held in the past include:

- Claims handling
- Supervising
- Office Manager and
- Chief Claims Officer

He has taught the AIC program for the IEA for 17 years, and has also developed and presented numerous training sessions for PRISM and as an independent consultant.

Lastly, he has also developed and/or participated in numerous presentations at the CAJPA and PARMA annual conferences.

CAROLE MCCULLEY

Geographic Area
Preferred:
STATEWIDE

Assignment Length
Preferred:
OPEN

Experience/Titles Held:

- County Public Guardian
- Social Worker (I/II)/Supervisor
- Program Manager

Education:

- CEC: UC Davis Extension - Davis, CA
- Master of Science, Psych: University of Phoenix - Phoenix, AZ
- Bachelors Behavioral Sciences, BSW: CSU Chico - Chico, CA

Certifications/Licenses/Awards/Memberships:

- Federal Case Review Certified, CDSS
- PA/PG/PC Certified (2023)
- County Prevention Collaborative, Prevention Excellence, DHCS (2012)
- Certified Public Guardian with California Association of Public Administrators, Public Guardians, and Public Conservators and appointed by Modoc County Board of Supervisors
- Certified Federal Case Reviewer with Northern Training Academy
- Certification and training completed for data systems utilized CMIPSII, LEAPS and CWS/CMS computer system
- Certified and Trained in Red Cross Shelter Program

Service Area		Rates (per hour)	Years of Experience
Health & Human Services (IHSS and Social Work)	Project Manager/ Program Developer	\$125-150	18
	Budget Analysis	\$125-150	18
	Management/ Administration	\$125-150	15

Work History:

My experience includes working with Health and Human Services Agencies for eighteen years. This experience has included direct Social Work positions to Management/Administration positions. Working in small rural counties, I have experienced implementation and development of programs and budgets that in larger counties I would not have the experience doing.

Program Development and implementation included taking a mandate or opt in program created by the California Department of Social Service (CDSS) and creating a budget, employee training plan, hiring employees, monitor data outcomes, creating sustainability plans, presenting plans to County Administration, and adhering to budget and program reporting requirements.

Some of the programs I've helped implement include: Resource Family Approval Program, Title IV-E Foster Care, Sexual Assault Response Team, Public Guardian and Public Conservator Program, CMIPS II Conversion, KATIE A, and other Child Welfare Program/In Home Support Services/Adult Protective Services Mandates.

I also had the opportunity to coordinate program implementation with local community based projects that required many different agencies to coordinate funds in order to create a large project. An example of that is Forty Developmental Assets, Breaking Down The Walls With Phil Boyte, Prevention Collaborative, and Juvenile Delinquency Block Grant. All of the above mentioned accomplishments required coordination and planning with multiple outside agencies such as non-profits, CDSS (multiple departments within CDSS), multiple funding sources, local county administration, Board of Supervisors, and fiscal departments internally and externally. During these experiences mentioned above, I have successfully written many grants or funding allocation reports to support these projects.

It is my goal to help counties with special projects or identify areas of improvement that will improve their overall function and minimize liability for the County.

List of Consultants

RALPH KORN

Service Area		Rates (per hour)	Years of Experience
Risk Management	Risk Manager	\$100-175	51

Work History:

Duplan Corporation - 1st Director of Insurance/Risk Management

- Organized the various subsidiaries into a viable and effective blanket insurance program
- Introduced and established loss prevention and control programs among the subsidiaries

E & J Gallo Winery - Director of Insurance

- Took the company into a self-insurance program for CA workers' compensation as well as for salaried employees' group health benefits

Greyhound Corporation - Vice President - Insurance

- Supervised staff of 25 employees

SRG Strategy & Risk Group - President/CEO and Founder

- Contract Administrator for Valley Schools Workers' Compensation Pool
- Performed property/casualty claims audits for self-administered clients as well as Lloyds Underwriters

Kern County - Risk Manager

- Supervised staff of approximately 30 employees, many were Workers' Compensation adjusters
- Served on the Board of Directors of PRISM for Kern County

City of Bakersfield - Risk Manager

- Formed the City's Medical Provider Network (MPN) - saving the City several hundreds of thousands of dollars
- Served on the Board of Directors of ACCEL for the City
- Chair of their Claims & Underwriting Committees
- Supervised 2 assistants and was directly involved in the preparation of the Risk Management budget which represented approximately \$11M

Geographic
Area
Preferred:
COUNTRYWIDE

Assignment
Length
Preferred:
1 MONTH OR LESS

Experience/Titles Held:

- Director of Insurance/ Risk Management
- Vice President - Insurance
- Involved in forming over 30 captive insurance companies in Bermuda and Hawaii

Education:

- BS: Loyola University - Chicago, IL

Certifications/Licenses/Awards/

Memberships:

- CPCU
- Golden Empire Chapter: Board of Directors
- RIMS: Piedmont Chapter Founder & First President; National Vice President, Executive Committee
- Society of Risk Management Consultants Member
- PRISM Board of Director Member
- ACCEL Committees: Board of Directors, Vice President, Executive, Claims/Underwriting (Chair), Finance
- Board of Directors (HOA): Windemere (Phoenix, AZ) and East Hills Village

CATHY REINEKE

Geographic
Area
Preferred:
STATEWIDE

Assignment
Length
Preferred:
1 WEEK +

Experience/Titles Held:

- Executive Director for School Insurance Pool
- Managed claims (WC & Liab) for 24 school districts and County Office of Education
- Risk Management Consultant
- Chief Risk Officer
- Appointed by Governor to Prop/Liab Board overseeing Self-Ins Pools
- Risk Management in Retail setting; managed \$7M WC Program in US, monopolistic WC Programs in 7 Provinces in Canada

Education:

- MBA - Seattle, WA
- BA, English - Missoula, MT

Certifications/Licenses/Awards/Memberships:

- ARM
- PRISM Committees: Board of Directors and Legislative
- Member: PARMA, PRIMA, CAJPA
- PRIMA Chapter President, Washington State

Service Area		Rates (per hour)	Years of Experience
Claims Management	Chief Claim Officer	\$150	30
	Liability Claims Manager	\$150	30
	Litigation Manager	\$150	30
	WC Claims Manager	\$150	30
Human Resources	Strategic Planning	\$150	15
Risk Control	Chief Risk Control Officer	\$150	30
	Safety & Loss Control Analyst II	\$150	30
Risk Management	Risk Manager	\$150	30
	Pool/JPA Administrator	\$150	30

Work History:

- 30+ years in all phases of Risk Management
- Public, non-profit and private sector consulting and management of risk programs
- 2 years claims management in county setting (parks, solid waste, public works)
- 17 years risk management in school setting
- 30 years management of worker's compensation programs (self-insured/self-administered, large deductible, and indemnity programs)
- 30 years management of complex liability claims management including sexual abuse, product liability, employment practices, and as a paralegal in a plaintiff law firm. Included suspended scaffolding and construction industry
- Contract administration, indemnification, scope of work definitions
- Loss control including establishment and implementation of OSHA compliance, safety committees, review of accidents (preventable/non-preventable)
- Development and delivery of training programs including risk, safety, and interactive process
- OCIP Programs, loss control, insurance, claims
- Achieved CAJPA Certification (twice with Excellence)

List of Consultants

PEGGY HUNTSINGER

Geographic
Area
Preferred:
NORTHERN CA

Assignment
Length
Preferred:
ANY

Experience/Titles Held:

- Sr. Workers' Compensation Claims Coordinator
- Disability Manager
- Assistant Risk Manager
- Oversight and Administration of:
 - * County's Self-Insured Workers' Compensation Program and Safety Program
 - * Family Medical Leave Act (FMLA)
 - * California Family Rights Act (CFRA)
 - * Pregnancy Disability Leave
 - * Americans with Disabilities Act (ADA)
 - * Property/Casualty Insurance Policies
 - * Certificates of Insurance Management
- Utilized PeopleSoft - worked on Absence Management module to better track protected leaves of absence
- Project Manager: County's Wellness Connect event

Education:

- AA, Ohlone College - Fremont, CA

Certifications/Licenses/Awards/ Memberships:

- ARM
- WCCA

Service Area		Rates (per hour)	Years of Experience
Claims Management	WC Claims Manager	\$120	22
	Return to Work Coordinator	\$120	21
Risk Control	Safety & Loss Control Analyst II	\$120	5+
Risk Management	Risk Analyst	\$120	22

Work History:

I worked for Stanislaus County for almost 22 years. I began my employment with Stanislaus County as a Senior Workers' Compensation Claims Coordinator and was later promoted as the County's first Disability Manager, and eventually the County's Assistant Risk Manager.

Accomplishments of Note:

Temporary and Permanent Accommodations: Development of the County's temporary modified duty program. Initiated permanent accommodations for employees injured on the job and worked with the County's HR team to foster a focus on accommodation under the ADA for employees that were not caused by a work-related event.

Certificates of Insurance: Worked with key staff in Purchasing, Risk Management, County Counsel and Information Technology to develop a work flow and data base to improve the way the County obtains and tracks certificates of insurance. This process improvement was necessary to make sure that all departments adhere to the County's insurance requirements. We worked with County Counsel to modify our contracts allowing Risk Management to carve out the insurance requirements and implemented the use of different insurance exhibits. This project is in beta test and continuing to evolve.

Wellness Connect event: Team lead for the County's 2nd and 3rd annual Wellness Connect events.

Absence Management: Part of a team implementing the Absence Management module in PeopleSoft. Implementation of the Absence Management module will improve the County's ability to administer protected leaves of absence.

Professional/Community Involvement: Worked with the Disability Management Employer Coalition (DMEC) to open a chapter in Modesto. DMEC moved the Central Valley Chapter of DMEC to Modesto and I was the local chapter's first president in Modesto. I have been a speaker/presenter at several DMEC National events, two Guns and Hoses events and other local conferences.

List of Consultants