

# REGISTER TODAY!

PRIMA Institute 2018 (PI 18) is the premier educational program for new and seasoned risk management professionals who want to learn more about emerging trends and best practices. PI 18 is an innovative educational symposium comprised of fundamental risk management curriculum, outstanding faculty and excellent networking opportunities.



**PI18**  
PRIMA INSTITUTE 2018

# BIG IDEAS.

# SMALL SETTING.



**PRIMA INSTITUTE**  
The Industry's Premier Risk Management Training Program

November 5–9, 2018  
West Palm Beach, Florida  
[institute.primacentral.org](http://institute.primacentral.org)

# ENHANCE YOUR PUBLIC RISK MANAGEMENT SKILL-SET. JOIN YOUR PEERS AT THE 2018 PRIMA INSTITUTE!

## PI ATTENDEES ENJOY THE FOLLOWING BENEFITS:



### 100, 200 AND 300 LEVEL SESSIONS

The 100, 200 and 300 level sessions provide an excellent platform for attendees to learn and build their risk management skill-set. The curriculum becomes increasingly rigorous, as attendees matriculate through PI. The level of difficulty coincides with the session number: the higher the number, the more intense the curriculum.



### EDUCATORS WHO ARE LEADERS IN THE INDUSTRY

PI attendees receive instruction from subject matter experts. Faculty members use innovative teaching styles to engage and further develop PI attendees.



### COLLABORATIVE LEARNING

Classroom instruction and interactive group learning give attendees an opportunity to flourish in a holistic educational experience. Casual networking events during PI allow attendees and faculty members to build valuable professional relationships beyond the classroom.



### CUSTOMIZED EXPERIENCE

PI consists of daily themed tracks that formulate this intense risk management training. Participants are able to attend one day or every day according to their learning needs. PI is best experienced in its totality. Each session is formatted to give attendees a clear understanding of the obstacles faced by risk management professionals and the innovative strategies used to resolve the issues.

PI attendees begin each day engaged in an interactive information exchange with their peers! Take advantage of this excellent networking opportunity, join us at PI 18!



# MONDAY, NOVEMBER 5

## Day One • Risk Leadership – 100 Series

### RISK MANAGEMENT SPEED DATING

PI will begin with risk management speed dating. This activity is designed to create an exchange in which attendees learn and share information regarding the diverse challenges risk management professionals face daily.

### THE LANGUAGE OF INSURANCE: TERMS, CONDITIONS AND POLICY MANAGEMENT

This session is designed to lay the groundwork for understanding the layout of an insurance policy and the unique terms and conditions that surround various types of coverages.

**Speaker:**

Carleen Patterson, ARM-P, CIC, CRM, *Aon Risk Solutions*

### RISK ASSESSMENT AND THE LOSS CONTROL PROCESS

This session serves as an introduction to the “Tip of the Risk Management Iceberg.” You will learn how to increase your risk management capacity, identify key risk influencers within your organization and develop risk communication strategies. What do you do with all of this new information? How do you make it work in your entity? How do you get all of your colleagues on board? To make your program a success, everyone must buy in—from the newest laborer to the most seasoned elected official.

**Speaker:**

David Weightman, CPCU, CSP, ARM-P, *The PMA Companies*

### MANAGING VS. LEADING—WHAT’S THE DIFFERENCE?

Managing, or the ability to manage, is a critical trait that strong organizations require in order to properly function. However, people often confuse managing with leading, which is a different skill set that requires a different approach. In this session, we will review the characteristics of both managers and leaders, and look at how to develop these qualities so that effective managers can continue to grow and become strong leaders.

**Speaker:**

Stephen Dzury, *Berkley Public Entity Managers, LLC, a W.R. Berkley Company*

### FLEET RISK: RISK MANAGEMENT FOR PUBLIC FLEET OPERATIONS

In providing uninterrupted services 24 hours a day, 7 days a week, a public entity’s fleet contains a variety of motor vehicles, many of which create unique liability exposures that require special controls and driver training. In any single vehicle accident event, the claim may be directly impacted by how you manage your fleet operations. This session will walk through many of the key elements of a fleet risk management program and provide practical examples to help solve many of the most common causes of loss. Principles of fleet safety and risk management will be presented to assist managers and fleet administrators with making better decisions, policies and procedures to control these identified exposures.

**Speaker:**

Tiffany Allen, ARM-P, PS-MESH, *Travelers*

### WORKERS’ COMPENSATION BASICS

Workers’ compensation is a complex program and the statutory requirements vary from state to state. These claims are usually the greatest risk in both frequency and severity to all types of organizations. This session will discuss the benefits provided to an injured employee, such as wage replacement, medical treatment and vocational rehabilitation. The presenters will discuss various initiatives on how to control costs and share information to impact these claims. Additionally, they will discuss the role of the organization in managing claims and the third party administrator’s (TPA) role in the process.

**Speakers:**

Lori Gray, *Prince William County, VA*

John Waggoner, CPCU, ARM, *The PMA Companies*



### RISK MANAGEMENT TRIALS AND TRIBULATIONS

Share your success stories and learn innovative methods to approach the difficulties you are experiencing!

### SAFETY PROGRAMMING: HOW “MATURE” IS YOUR SAFETY MANAGEMENT PROGRAM?

According to the U.S. Department of Labor - Bureau of Labor Statistics, nonfatal workplace injuries and illnesses among local government workers have been almost double that of private industry workers and nearly 1.5 times that of state government counterparts. Do you have a safety management program in place that achieves a best practice safety culture? How “mature” is your safety management program? Have you taken the time to conduct an unbiased assessment of what is working and what may need improvement? This session will explore eight key components of a safety management system and allow participants to grade themselves on a continuum for achieving a best practices safety culture. Learn what one city has done to benchmark their safety management efforts and identify measurable steps toward improvement.

**Speaker:**

Tiffany Allen, ARM-P, PS-MESH, *Travelers*

### CONTRACTUAL RISK TRANSFER

This interactive session will provide attendees with a basic understanding of contractual risk transfer through the use of contracts, including the use of hold-harmless and indemnification provisions and waivers. The speaker will also lead an in-depth conversation about certificates of insurance, what they are, when they should be used, and the difference between a certificate of insurance and a policy endorsement. The presenter will use real life examples covering areas such as service contracts, maintenance contracts and everyone’s favorite—special events contracts.

**Speaker:**

Amy Larson, Esq., *City of Bloomington, MN*

### SPECIAL EVENTS AND FACILITY USE

Special events bring special risks that require special consideration. Whether the entity is conducting the event itself, or whether an individual, group or organization wishes to utilize the public entity’s facilities or right-of-way for their event, every aspect of this special occurrence needs to be evaluated and weighed. This session will outline the steps to follow to ensure your entity understands the exposures presented by the event, and that your entity has taken the appropriate precautions to minimize the risk. Attendees will examine the coverage issues common in addressing special events risks. Special events in your city or town play an important role in community life. The risk management professional needs to evaluate the exposures to do everything within their control to minimize the risk and maximize the value of the event to the community.

**Speaker:**

Michael Fann, ARM-P, MBA, *The Pool - TN*

### #TIMESUP—HARASSMENT CLAIMS, INVESTIGATIONS AND LAWSUITS

Late 2017 and early 2018 have ushered in some significant societal changes, particularly the #MeToo and #TimesUp movements, addressing workplace harassment, abuse and bullying. This session will explore the implications these changes have on our workplaces and our professional interactions as these movements continue to evolve. We will review how workplace investigations involving allegations of abuse and harassment should be conducted, who should conduct the investigation and how to handle and manage the litigation that often arises when these claims are made.

**Speaker:**


Stephen Dzury, *Berkley Public Entity Managers, LLC, a W.R. Berkley Company*

### TELEMATICS

This session will take an inside look at an actual user’s experience using telematics as a fleet management tool to improve driver behavior, safety and citizen services, control costs, and establish cost saving efficiencies. Attendees will garner a clearer understanding of the benefits of utilizing telematics technology.

**Speaker:**

Steve Hightower, *City of Kingsport, TN*



For more  
information, contact  
[education@primacentral.org](mailto:education@primacentral.org).

# WEDNESDAY, NOVEMBER 7

## Day Three • Emerging Trends in Risk – 200 Series

### RISK MANAGEMENT TRIALS AND TRIBULATIONS

Share your success stories and learn innovative methods to approach the difficulties you are experiencing!

### SOCIAL MEDIA—PITFALLS AND POSSIBILITIES FOR PUBLIC ENTITIES

Social media can be a cost-effective communications tool for municipalities looking to fulfill mandates, increase public participation and encourage greater social activism. However, the profound public nature of social media—the sharing of vast amounts of information and the direct interaction with more and more citizens—may pose threats to privacy and other basic constitutional rights. This session outlines some of the concerns social media may raise for public entities. It also recommends a straightforward, policy-driven approach to the management of social media, enabling municipalities to capitalize on this emerging citizen engagement tool while minimizing exposure to associated risks.

**Speaker:**

Thom Rickert, CPCU, ARM-P/E, ARC, ARe, *Trident Public Risk Solutions*

### INSURANCE BEYOND THE BASICS: RETENTIONS, TRUSTS, CAPTIVES & BONDS

This session is designed to take the discussion beyond the traditional risk transfer mechanism of purchasing an insurance policy. We will examine alternative ways to manage risk, as well as discuss the advantages and disadvantages of each alternative risk transfer method and when they should be considered.

**Speakers:**

Carleen Patterson, ARM-P, CIC, CRM, *Aon Risk Solutions*

Jose Peralta, ARM, *Aon Risk Solutions*

### THE GROWING TENTACLES OF OPIOID AND SUBSTANCE ABUSE

During this session, the presenter will delve into the history of opioid abuse, provide the basics of opioid prescription best practices and reveal alternative treatment options. Attendees will garner an understanding of how state legislatures are responding to the issue of opioid and substance abuse.

**Speaker:**

Teresa Bartlett, MD, *Sedgwick Claims Management Services, Inc.*

### PTSD IN THE WORKPLACE

The presenter of this session will define post-traumatic stress disorder (PTSD), what triggers it and how it is currently treated. In addition, the presenter will also disclose alternative treatment options and successful strategies for claims involving PTSD.

**Speaker:**

Teresa Bartlett, MD, *Sedgwick Claims Management Services, Inc.*

### FINANCE: TOTAL COST OF RISK AND COST ALLOCATION

Cost of risk and allocating it to the various agencies or departments in an entity is a critical budgetary responsibility. Understanding the components of cost of risk, how to estimate it and how to reduce it is a vital risk management function. In addition, how to allocate cost of risk equitably requires understanding the best practices and principles underlying it so that stakeholders buy into it. During this session, attendees will learn how to apply best practice principles to the allocation design to ensure equity and stability in funding.

**Speakers:**

Lori Gray, *Prince William County, VA*

Mujtaba Dattoo, ACAS, MAAA, FCA, *Aon Risk Solutions*

# FRIDAY, NOVEMBER 9

## Day Five • Emerging Trends in Risk – 300 Series

### RISK MANAGEMENT TRIALS AND TRIBULATIONS

Share your success stories and learn innovative methods to approach the difficulties you are experiencing!

### DIVERSITY & INCLUSION TODAY—CIVIL RIGHTS, ALL RIGHTS IN PUBLIC GOVERNANCE

This session is designed to present a framework to address civil rights issues in the workplace. The presenter will define diversity and inclusion. Attendees will learn best practices used to create an inclusive culture in public entities.

**Speaker:**

Mauricio Velazquez, MBA, *Diversity Training Group*

### SUCCESSION PLANNING—IT'S NOT AN EVENT

Whether you are approaching retirement age or are in the middle of your career, succession planning should be an important consideration for all public entities. The presenters will discuss key steps in the succession planning process both on an individual basis and organizationally.

**Speakers:**

Joey Sylvester, *Arthur J. Gallagher & Co.*

Jessica Govic, CLCS, *Arthur J. Gallagher & Co.*

### ERM WORKSHOP: OVERCOMING BARRIERS AND IMPLEMENTATIONS IN THE PUBLIC SECTOR

Enterprise risk management (ERM) has been around for more than a decade, but still many public entities and schools have not created robust, sustainable ERM programs. Why is that? We'll review the commonly encountered barriers and examples of successful resolutions to those challenges. We'll also consider how elements of ERM could support both the strengths and the challenges facing your public entity.

**Speaker:**

Dorothy Gjerdrum, ARM-P, CIRM, *Arthur J. Gallagher & Co.*

# THURSDAY, NOVEMBER 8

## Day Four • Cyber Liability – 300 Series

### PI 19 CURRICULUM DEVELOPMENT

#### CYBER & PRIVACY LIABILITY—IS IT WORTH THE RISK?

The world of cyber and privacy insurance is changing. As more insurers enter the market, how do you separate good policy forms from the bad? In this session, we will discuss how the coverage has evolved and what to look out for when considering buying cyber insurance. The main reasons why organizations purchase the coverage is also changing. We will consider how the provision of pre- and post-breach services and first-party protections are driving the growth of this insurance class. Many organizations also struggle with identifying the limits available in the market to cover their risk as well as how to establish the potential cost if an event occurred. We will look at some of the risk management considerations that need to be addressed and how cyber insurance loss costs can escalate.

**Speaker:**

Geoff Kinsella, FCII, MBA, *Safeonline LLP*

#### EMERGING TECHNOLOGIES AND PUBLIC RISK - "HI! I'M LISTENING"

Emerging technology is rapidly changing the way public and private sector officials conduct business. Artificial intelligence, biometrics, cryptocurrency and the internet of things present new opportunities as well as challenges for public risk management professionals. In this session, we will discuss flexible approaches to adjusting to the new world that is being shaped by emerging technologies. We will also discuss resources to manage the public risk.

**Speaker:**

Kelvin Coleman, *Route 2 Strategies*

#### TECHNOLOGY ERRORS AND OMISSIONS - WHO NEEDS IT?

Technology errors and omissions (E&O) insurance is just for technology companies, right? Activities that were once the domain

(no pun intended) of traditional technology companies are now being undertaken by entities one would not traditionally associate with technology provision. Lines are now becoming more blurred as traditional "offline" companies enter the technology development/service field. The public sector is no different. Should you be considering putting in place technology E&O coverage for your entity? In this session, we will look at the coverage offered and discuss the enhancements that one should be looking for when considering buying protection. We will also consider how the market has evolved to offer a combined cyber and technology solution and the advantages of this approach.

**Speaker:**

Geoff Kinsella, FCII, MBA, *Safeonline LLP*

#### CYBERSECURITY: THE 5TH DOMAIN

In an increasingly interconnected world, it is critical for public sector risk managers to understand and respond to cyber incidents with speed and certainty. This session will emphasize cyber incident planning that focuses on people, processes and products. This time will be particularly important for small- and medium-size jurisdictions with limited resources.

**Speaker:**

Kelvin Coleman, *Route 2 Strategies*

#### CYBER RISK ASSESSMENTS IN PUBLIC PRIVATE CONTRACTING

As the current threat landscape continues to shift, public risk management professionals need to develop new strategies to assess risk. This is especially important as organizations begin to devote significantly more time, money and resources into securing technology. This session will focus on identifying the effective partnerships with cybersecurity contractors. We will also explore processes to evaluate the right public private partnerships for your organization.

**Speaker:**

Kelvin Coleman, *Route 2 Strategies*

#### NEWLY ELECTED/APPOINTED OFFICIALS: UNDERSTANDING THE CONSEQUENCES OF RISK

When leadership changes, things rarely stay the same. Those newly elected or appointed usually have an opinion regarding what needs to be done differently, but not always how to get it done with maximum benefit.

We will discuss operational, financial and reputational risks and opportunities that leadership must understand in order to avoid unintended consequences and increase their positive impact. We will showcase examples of best practices and poorly handled situations, as well as the results. The format is designed to encourage discussion, war stories and 'well done' efforts.

**Speaker:**

Richard Vincelette, *Berkley Public Entity Managers, LLC, a W.R. Berkley Company*

#### PROPERTY APPRAISALS—MEASURING EXPOSURE

This session will discuss a best practice property appraisal process, from review of current values to the commissioning and receipt of the valuation consulting report. Attendees will learn about the insurance market forces that are driving the demand for supportable values as well as accurate COPE data and how to conduct your own initial diagnostic review of your current property values. The session will also highlight the optional levels of service appropriate for valuing properties in public entities and the structuring of an affordable appraisal program over a number of years. The presenter will utilize a case study to challenge attendees to review appraisal results, compare the current declared values and explain any significant disparities.

**Speaker:**

Bradley Schulz, ASA, *Duff & Phelps*

# ATTENDEE INFORMATION

## REGISTRATION

Each day sessions begin at 8:00 am and end at 4:15 pm.

### REGISTRATION FOR ENTIRE PROGRAM

|            | Before August 31 | After August 31 |
|------------|------------------|-----------------|
| Member*    | \$875            | \$985           |
| Non-member | \$1,375          | \$1,485         |

If you are unable to attend the entire program, you may register for one or multiple days.

### A LA CARTE PRICING

Can't get away from the office for a full week? Pay a la carte pricing and attend three out of five days.

- Monday, November 5 through Wednesday, November 7 attend sessions regarding Risk Leadership, Risk Methodology and Emerging Trends in Risk
- Wednesday, November 7 through Friday, November 9 attend sessions regarding Emerging Trends in Risk, Cyber Liability and Emerging Trends in Risk

|            | Before August 31 | After August 31 |
|------------|------------------|-----------------|
| Member*    | \$625            | \$735           |
| Non-member | \$875            | \$985           |

### ATTEND PI FOR A DAY

|            | Daily Rate |
|------------|------------|
| Member*    | \$260      |
| Non-member | \$335      |

\*Full-time students will receive the PRIMA member rate, with valid student ID.

Your registration fee includes continental breakfast, breaks and lunch daily, in addition to the Monday and Wednesday networking events.

### HOTEL INFORMATION

PRIMA Institute will be held at:  
**PGA National Resort and Spa**  
400 Avenue of the Champions  
West Palm Beach, FL 33418  
Ph. 800.863.2819

All attendees will receive a special rate of \$175 single/double (plus taxes). Reservations must be made by Friday, October 12, 2018, in order to guarantee this rate. Reservations made after this date can only be honored on a space available basis. To make your hotel reservations, call the toll-free reservations line at 844.821.0028 and identify yourself as part of the Public Risk Management Association group.

PRIMA has contracted special rates for this conference. Hotel rooms booked outside the PRIMA block may hinder our ability to continue to bring PRIMA Institute attendees the best possible conference experience.

To register, visit [institute.primacentral.org](http://institute.primacentral.org).

### GROUND TRANSPORTATION

Shuttle services to and from Palm Beach International Airport will be provided by the PGA Resort at the following times:

- Pickup from Palm Beach International Airport to PGA Resort: Sunday, November 4th, 11:00 am - 3:00 pm
- Pickup from PGA Resort to Palm Beach International Airport: Friday, November 9th, 5:00 pm - 9:00 pm

For more information regarding shuttle services and getting around West Palm Beach, please visit <http://www.pbia.org/ground/>.

### NETWORKING AT PI 18

Networking is essential to your success as a professional. PI 18 features two networking events.

### MONDAY, NOVEMBER 5 • WELCOME RECEPTION

PI attendees will gather for a casual meet and greet.

### WEDNESDAY, NOVEMBER 7 • SOCIAL HOUR

PI participants will take part in a fun-filled social hour.

### SPECIAL ACCOMMODATION REQUEST

If you require special accommodations, please contact Monique Gilliam, PRIMA's manager, meetings and conferences, at 703.253.1263, or check the appropriate box during the online registration process.

### SOCIAL MEDIA

Join your peers and the excitement before, during or even after PI 18! Take a moment to learn how you can connect with your risk management peers and conference attendees through Facebook, Twitter and LinkedIn. Start making connections today!



- Join the PRIMA group on LinkedIn to connect with PI faculty and other fellow attendees.
- Get regular updates from your peers by following us on Twitter! Our official Twitter handle is PRIMAcentral and our Twitter hashtag for this event is #Institute18. Use our hashtag to connect with your fellow risk managers, shout-out faculty members or post something you learned that everyone should know!
- Like us on Facebook to get updates on PI 18 events and more! Go to [www.facebook.com/primacentral](http://www.facebook.com/primacentral) today.

## SPONSORS

Thank you to our 2018 Sponsors!  
PI would not be possible without their generous support!

### PLATINUM



### SILVER



### BRONZE







Public Risk Management Association  
700 S. Washington St., Suite 218  
Alexandria, VA 22314

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The Industry's Premier Risk Management Training Program



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