

FALL EDUCATIONAL FORUM

October 2 - 5, 2016



Sheraton Denver Downtown Hotel • Denver, Colorado

TRACK COLOR CODE

CLAIMS & LITIGATION
MARKETING & MEMBER SERVICES
REINSURANCE & CAPITAL MANAGEMENT

SUNDAY, OCTOBER 2

1:00 PM - 5:00 PM

REGISTRATION & INFORMATION DESK South Convention Lobby

NETWORKING LOUNGENorth Convention Lobby

Both the registration/information desk and the networking lounge are open to all conference attendees during conference hours.

2:00 PM - 5:00 PM

LEGALIZED CANNIBIS MANUFACTURING TOUR

Separate preregistration is required to attend. The tour bus will leave promptly at 2:00 PM from the hotel front entrance.

6:00 PM - 8:00 PM WELCOME RECEPTION

South Convention Lobby

MONDAY, OCTOBER 3

7:00 AM - 8:15 AM
CONCURRENT BREAKFASTS

GENERAL BREAKFASTSouth Convention Lobby

FIRST TIME ATTENDEE BREAKFAST Windows

8:30 AM - 10:00 AM

KEYNOTE

LEARNING HOW TO LISTEN TO WEAK SIGNALS

Charlie Grantham, Teacher, Community Design Institute
WEAK SIGNAL LESSONS FROM FERGUSON, MISSOURI

Pam Hylton, Assistant City Manager, Richmond Heights, Missouri; former Assistant City Manager, Ferguson, Missouri

Grand Ballroom

Weak signals provide valuable clues about how to prepare for the future of pooling operations, but you have to be listening carefully and know when to tune in or when to tune out. This opening keynote presentation will help you tune into weak signals that could be meaningful to the future of your pool.

- Is that bad litigation outcome reflective of the specific fact scenario, or could it be the start of an important trend?
- What subtle changes in consumerism should impact the way your pool delivers and markets its services?
- With so many big changes in the world's capital markets, how do you know what matters to your pool's investment outlook?

After you've been given the context of weak signals and learned how to spot them, listen to a powerful reflection about one community's experience managing through a law enforcement use of force scenario, public scrutiny, racial tension, and corresponding upheaval. The story of what happened in Ferguson, Missouri might present a few important weak signal lessons for all pools.

10:00 AM - 10:15 AM REFRESHMENT BREAK

10:15 AM - 11:00 AM LEARNING TRACK SESSIONS

All tracks will participate in separate open discussions regarding the keynote address.

CLAIMS & LITIGATION

Windows

MARKETING & MEMBER SERVICES

Grand Ballroom

REINSURANCE & CAPITAL MANAGEMENT

Silver



MONDAY, OCTOBER 3 - continued

11:15 AM - 12:15 PM LEARNING TRACK SESSIONS

BODY WORN CAMERAS FROM A CLAIMS & LITIGATION PERSPECTIVE

Robert Faigin, Esq., Police Legal Advisor Windows

Law enforcement agencies have started adopting body worn camera equipment and policies, with an eye toward effective policing and protecting law enforcement officers. This session will look at body worn camera use specifically from the claims and litigation management perspectives, examining issues such as data storage, retrieval and accessibility, officer review of footage prior to making a statement or writing a report, evidentiary issues such as chain of custody, and more. This session will help prepare your pool to represent a public entity against a claim involving a body worn camera, blending practical advice alongside high-level policy considerations.

PRACTICAL SUGGESTIONS FOR CYBER SECURITY

Kevin Crawford, Executive Director, New York Municipal Insurance Reciprocal

Terry Norwood, CEO/President, Midwest Public Risk Ryan Spelman, Senior Director, Center for Internet Security Tower Court D

Cyber risks present growing concerns that need your attention, but best practices to address them might seem daunting. Hear from two pools about steps they are taking to implement practical solutions for cyber security risk assessment, as well as best practice provisions for their members. They will also discuss the organizational improvements they've made to secure pool operations.

STATE OF THE REINSURANCE MARKET

Brian Viscusi, Senior Vice President, Munich Re Silver

This presentation will provide a review of the current reinsurance (and insurance) marketplace, as well as identify some emerging exposures that could present a financial threat to your pool and reinsurers. The session will also provide a perspective on what your pool might expect from your reinsurers and related partners in the future.

12:30 PM - 1:30 PM

LUNCH

Grand Ballroom

Recognition Awards and Annual Membership Meeting

1:45 PM - 5:15 PM

POOLING BASICS PART I

Shawn Bubb, Director of Insurance Services, Montana School Boards Association

Mujtaba Datoo, Actuarial Practice Leader, AON Risk Solutions Joel Kress, Director of Special Projects, AGRiP Frank Ramsey, Senior Consultant, Willis Towers Watson Silver

Are you new to pooling? The Pooling Basics curriculum will provide an overview of everything those new to pooling might need or want to know. Part I will cover actuarial rate and funding studies, the claims process, and underwriting. Material will be shared in traditional presentation style, with expert presenters engaged throughout for group discussion, as well as opportunities for peer-to-peer collaboration.

1:45 PM – 3:00 PM LEARNING TRACK SESSIONS

BITCOIN, RANSOMWARE, & THE CYBER BLACK MARKET

Inga Goddijn, Executive Vice President, Risk Based Security Windows

Crypto currencies like Bitcoin, Ethereum and Litecoin have become the payment fuel powering malicious cyber activity. High-profile events like the database of 117 million LinkedIn user names and passwords offered for sale for 5 Bitcoin have shined a light on the business of cyber crime. But what exactly is a crypto currency and more importantly, what does it mean for your pool if one of your members is confronted with a crypto currency demand? This session will help you understand the emerging world of cyber crime, examine the pros and cons of bitcoin ransom payments, and consider how to help members through challenging cyber jacking events.

DEVELOPING A STRATEGIC APPROACH TO MEMBER COMMUNICATIONS

Amy Guilford, Chief Administrator, Property/Casualty Pool and Workers' Compensation Fund, SET SEG Molly Mellema, Associate Administrator, Property/Casualty Pool and Workers' Compensation Fund, SET SEG Grand Ballroom



MONDAY, OCTOBER 3 - continued

With the youngest Millennials beginning to enter the workforce a generational turnover is expected in the next ten years. Your pool needs to think about how, when, what, and why they are communicating with external audiences as the generations change. In this session, one pool will discuss the goals and tactics they used to implement a consistent, strategic, and targeted approach to member communications.

SHOULD I CHANGE MY RETENTION? A STRAIGHTFORWARD LOOK AT THE OPTIONS

Daniel Linton, Consulting Actuary, Select Actuarial Services Mary Frances Miller, Senior Consulting Actuary, Select Actuarial Services

Tower Court D

Whether to assume more risk can be a tricky evaluation. With so many factors to consider – such as the pricing being offered by reinsurers, types of coverages offered by your pool, the size of the exposure base, etc. – it's enough to make your head spin. This presentation will break down risk retention analysis in a straightforward manner, keeping in mind that not every pool's appetite for risk is the same. You will learn basic tools and ideas to better understand a risk retention analysis and consider whether your pool is assuming the appropriate level of risk for its future.

3:00 PM - 3:15 PM REFRESHMENT BREAK

3:15 PM – 4:15 PM LEARNING TRACK SESSIONS

WEARABLE DEVICES – A GAME CHANGER IN MANAGING WORK COMP CLAIMS

Zack Craft, Vice President, Rehab Solutions, One Call Care Management

Windows

Wearable technology is poised to become the decade's breakthrough in managing work comp injuries. Wearable technology can be used to prevent injuries, promote compliance with treatment recommendations, avoid complications and second injuries, and help employees with catastrophic injuries achieve greater independence. The introduction of wearable devices holds promise, but it also poses questions: What is the ROI? What are the liabilities of sensitive equipment? And how do you determine whether, and when, a wearable device might be the best solution?

CROSSING THE DIGITAL DIVIDE – MAKING YOUR MEMBER COMMUNICATIONS MATTER

Michelle Béchamps, President/Brand Strategist, Béchamps & Associates

Ken Giffin, Consultant, Béchamps & Associates

Tower Court D

As an evolving industry, pools have been talking about how there are looming demographic shifts in staff and leadership and how these shifts may impact the ability to remain current and relevant with members. You are now at a critical juncture and need to shift communication practices to keep pace with staff and member expectations. This session will take a deep dive into today's most successful communication methods and show how you can change your practices in a pragmatic and thoughtful way to make a difference with your stakeholder audiences.

TRENDS IN CAPITAL ADEQUACY

Kevin Wick, Managing Director, PricewaterhouseCoopers
Grand Ballroom

Over the last few years risk pools and health trusts have turned to capital modeling approaches to better assess funding requirements. This session will present the various sources of pooling capital needs and demonstrate how you can manage these capital needs by making different retention and investment decisions. In addition, capital modeling results will be compared to traditional pool solvency measures, such as risk based capital, confidence levels, and financial ratios.

4:30 PM - 5:15 PM LEARNING TRACK SESSIONS

SUPREME COURT CASES & TRENDS IMPACTING PUBLIC ENTITY POOLS

Lisa Soronen, Executive Director, State and Local Legal Center

Windows

This presentation will provide an overview of United States Supreme Court decisions impacting public entities and the pools who serve them. The review will include decisions already made by the Court, as well as those pending review, which together suggest important trends and considerations for the future legal environment of pooling.



MONDAY, OCTOBER 3 – continued

MEASURING THE ROI OF ONLINE SERVICE TRAINING

Phil Coons, Vice President, TargetSolutions
Don Lombardi, Fire Chief, West Metro Fire Protection District
Charles Williams, Loss Prevention Manager, CSAC Excess
Insurance Authority

Tower Court D

While safety training is universally needed for public entities, each pool member has their own particular stipulations for success. This session compares two pools' experiences utilizing an online training management system built to meet their members' specific needs. Learn how the pools measure benefits such as increased workplace safety, reduced claims, greater productivity, and member affinity.

HOW REINSURANCE CAN PROTECT AND ENHANCE THE VALUE, SURPLUS, AND REPUTATION OF YOUR POOL

Mark Shumway, Global Head of Strategic Advisory, JLT Re Grand Ballroom

Have you ever determined the value of your pool's reputation, and how that could fundamentally change over time? This session will introduce prescriptive analysis tools to help public entity pools protect and improve value, reputation, surplus and solvency through the use of underwriting controls and reinsurance. You will explore how relatively low-cost solutions can preserve and enhance your pool's reputation and value, helping to ensure that your pool will be operating and serving your members for years to come.

5:30 PM - 6:30 PM

QEI APPRECIATION RECEPTION AND BEER TASTING South Convention Lobby

AGRiP events demonstrate the excellent support QEI Patrons offer the public entity pooling community. This reception is an opportunity for all AGRiP members to thank our QEI Patrons while enjoying a local beer tasting and light appetizers.

TUESDAY, OCTOBER 4

6:00 AM

GROUP RUN

Meet in hotel lobby

7:00 AM - 8:15 AM

BREAKFAST

South Convention Lobby

8:30 AM - 9:45 AM

KEYNOTE

ISSUES TO MONITOR AS MARIJUANA BECOMES LEGALIZED

Steve Fast, Executive Director, Colorado School Districts Self Insurance Pool

Joe DePaepe, Pool Administrator, Colorado Special District Property and Liability Pool

Tami Tanouse, General Counsel/Deputy Executive Director, CIRSA

And Colorado Panelists

Grand Ballroom

Marijuana legalization may have been a weak signal at one time, but it is growing in strength and happening to varying degrees across the country. Colorado is the first state to fully legalize the substance. Hear from a panel of your pooling peers in the State as they share both the expected, and unexpected, impacts of marijuana legalization on their pool operations.

10:00 AM - 12:15 PM

POOLING BASICS PART II

Shawn Bubb, Director of Insurance Services, Montana School Boards Association

Mujtaba Datoo, Actuarial Practice Leader, AON Risk Solutions Joel Kress, Director of Special Projects, AGRiP

Frank Ramsey, Senior Consultant, Willis Towers Watson Silver

The second segment of this two-part series will cover risk management, member services, and financial reporting and auditing. The session will conclude with an open Q&A. The goal is to send you back home with at least one good question, the answer to which will enhance your understanding of your pool's operations and needs.

10:00 AM - 11:00 AM
LEARNING TRACK SESSIONS

TORT CAP TRENDS

Kirk Mylander, General Counsel, Citycounty Insurance Services



TUESDAY, OCTOBER 4 - continued

Tower Court D

Challenges to public entity tort caps create a number of claim and litigation worries for pools and their reinsurers. This presentation will examine recent tort cap experience in Oregon, as well as perspectives from other states. As part of the discussion, the session will examine litigation and legislative strategies pools might consider to maintain or strengthen the tort cap protections that are so valuable to us all.

IDEAS FOR IMPLEMENTING MEMBER DASHBOARDS

Jonathan Kipp, Operations Manager, Primex **Windows**

Successful pools regularly review past performance, tracking trends and identifying potential concerns to proactively discuss and address as appropriate. The review process allows pools to remain well-positioned to serve members into the future. But what indicators should you monitor? How will members know if they should be concerned? What benchmarks should be used to most effectively measure performance? Hear how one pool developed a robust member dashboard to ensure it monitors and shares critical indicators of organizational health.

CATASTROPHE MODELING, RISK MANAGEMENT, & REINSURANCE

Jake Clark, Managing Director, Guy Carpenter & Company, LLC

Sherry Thomas, Head of Catastrophe Management, Guy Carpenter & Company, LLC

Grand Ballroom

Catastrophe modeling has, and will continue to have, a greater influence in the pricing and formulation of reinsurance coverage and policies. In this session, risk modelers describe their processes, what the results mean (and what they DON'T mean), and how different parts of the industry use modeling. Additionally, this presentation will cover the risk management considerations and reinsurance implications of CAT modeling.

11:00 AM - 11:15 AM

REFRESHMENT BREAK

11:15 AM - 12:15 PM **LEARNING TRACK SESSIONS**

CHALLENGES AND CHANGES IN PRESUMPTION LEGISLATION

Joe DePaepe, Pool Administrator, Colorado Special District Property and Liability Pool

Mike A. Rogers, President, Colorado Professional Fire **Fighers**

Don Lombardi, Chief, West Metro Fire Rescue

Tower Court D

Legislation increasing the acceptance of presumptive work comp claims has been the trend for many years. In some states, these benefit expansions continue with both shortterm and long-term impacts. In other jurisdictions, presumption laws are shifting back toward middle ground, with care costs and management being balanced between work comp and health care systems. This session will explore the latest trends in presumption legislation and identify care options to monitor into the future.

STEWARDSHIP REPORTS FOR BOARDS

Mary Barrett, Director, Strategic Initiatives & Operations Support, Texas Association of School Boards Risk Management Fund

Windows

An organizational stewardship report accounts for activities undertaken with the pool's resources, as related to specific strategies and stated goals. In this session, learn one pool's process for developing a robust stewardship tool for their Board of Directors. You will learn about the pool's decision to implement a stewardship report; how to select information for inclusion; and how to effectively tell the story of your pool's results and accomplishments to your Board. The session will conclude with how the report has been received, and the ongoing evaluation process for continued enhancement.

REINSURANCE MIDDLEMEN: VALUE-ADDED RESOURCE OR NECESSARY EVIL?

Jenny Emery, Consultant, Emery Advisors

Grand Ballroom

It is almost 2017 and technology has revolutionized your access to virtually everything - except reinsurance. Why has the business of brokerage proven so impervious to change? What do brokerage services really cost, and what value do they really add to the transaction? Maybe you are unlikely to change the brokerage process altogether, but you can at



TUESDAY, OCTOBER 4 - continued

least optimize it for your pool. This session will offer uncensored insights and perspectives specific to pooling situations, so bring your questions and be prepared to engage in an interactive session.

12:30 PM - 1:30 PM

LUNCH

Grand Ballroom

1:45 PM – 2:45 PM LEARNING TRACK SESSIONS

RISE OF TECHNOLOGY RISK

Rick Brush, Chief Member Services Officer, CSAC Excess Insurance Authority

Andrew Kay, Public Sector Senior Vice President, Great American Insurance

Carol Lofness, Public Sector Divisional Vice President, Great American Insurance Group

Todd Schobel, Chief Executive Officer, STOP!t Scott Tennant, Area Vice President, Arthur J. Gallagher & Co.

Grand Ballroom

As schools and local governments have adapted to a technology-fueled world, new risks have emerged. From cyber bullying to online drug dealing, and from safety to sexual harassment, threats are often amplified by mobile technology and social media. The very same tools that have enabled these problems can now help thwart them, allowing pools to mitigate risks and get ahead of problem situations. The panel of pool and claim experts engaged in this session will explore trending tech risks and available claim management solutions.

WHY WSRMP CHANGED ITS MISSION

Deborah Callahan, Executive Director, Washington Schools Risk Management Pool

Windows

Follow the journey of the Washington Schools Risk Management Pool as they examine the biggest "Why" question, as in, why does the pool exist? And learn the corresponding steps WSRMP took to refresh, re-define, rebrand and re-inspire their entire operation.

CAPITAL MARKETS UPDATE: OPPORTUNITIES & RISKS

Brian Allen, Senior Vice President, C.S. McKee George Vitta, Senior Consultant, The Bogdahn Group Silver

This session will present a discussion of the current global economic environment and the expected impact on capital market investment opportunities and risks over the next several months. Topics will include U.S. and global economies and where they are in the economic cycle, capital markets and where they are in the current investment cycle, and specific challenges for fixed income and equity investors. Pool financial decision-makers will learn the balancing act of managing their pool's capital, as well as how to prepare for the near-future of our uncertain times.

2:45 PM - 3:00 PM REFRESHMENT BREAK

3:00 PM – 3:45 PM LEARNING TRACK SESSIONS

EVALUATING SYSTEM ADVANCES

Shawn Bubb, Director of Insurance Services, Montana School Boards Association

David Tweedy, Director of Risk Information Consulting, Bickmore

Grand Ballroom

Claims and risk management system vendors are turning their attention to pools and developing products that can increase operational efficiency and depth of pool services. Increasingly comprehensive systems are emerging that include claims management, memorandum of coverage (MOC) and certificate issuance, data analytics, portal access for members, rating, underwriting, policy management, and billing. This session will discuss the functions that leading vendors provide, the steps pool claims managers should take to assess current technology, and the cost and time parameters involved in switching to a new system.

IS THERE AN APP FOR THAT?

Stephen Dellerba, Senior Marketing Representative, Colorado Intergovernmental Risk Sharing Agency Courtney Fagan, Marketing Manager, Colorado Intergovernmental Risk Sharing Agency Brady Loveland, Technical Services Manager, Utah Local Governments Trust

Windows



TUESDAY, OCTOBER 4 - continued

Digital communication is a way of life and electronic member interactions will only continue to increase in number and popularity. Done correctly, a pool mobile platform can enhance the member experience, create affinity for your pool, increase your competitive advantage, and appeal to the new generation entering local government. In this session, you will learn about the development process, implementation, member reception, and ongoing maintenance of mobile technology at two pools.

EMERGING REINSURANCE EXPOSURES

Karen Bittner, Vice President, Munich Re America Gina Dean, Chief Operating Officer, CSAC Excess Insurance Authority

Silver

This session will facilitate a discussion of emerging risk perils with the potential to become frequent and/or severe losses to hit your claims department and reinsurers. You will be introduced to the many emerging exposures, go deep with two exposures that might be the next big thing, and discuss with your peers the "just below the surface" risks that keep you up at night.

3:00 PM – 3:45 PM LEARNING TRACK SESSIONS

A SPEED ROUND OF HOT TOPICS

Ann Gergen, Executive Director, AGRiP Chris Kogut, Principal and Consulting Actuary, Milliman Rick Spiers, Vice President, Claims, Genesis

Windows

This session will be conducted in a conversational roundtable format with brief expert overviews and group discussions about emerging hot topics - autonomous vehicles, drones, transgender policies, Naloxone, and more. If you are currently in the midst of handling a hot topic, come with your questions. And if your pool has successfully dealt with any of these topics, you are encouraged to share your experience and acquired knowledge.

MEMBER SERVICES SHOW AND TELL

Ryan Cole, Member Services Manager, Arizona School Risk Retention Trust

Silve

Come to this session prepared with an idea to share, a question to ask, or to take notes on member service tools,

tips, tricks and techniques you can implement in your own pool. Pools are using innovative methods to enhance member interactions every day, and this session will allow you and your industry colleague to brainstorm and build on one another's experiences.

UNALLOCATED LOSS ADJUSTMENT EXPENSE – THE SIX QUESTIONS YOU ALWAYS WANTED TO ASK

Ann Conway, Managing Director, Willis Towers Watson Stacey Mina, Consultant, Willis Towers Watson

Grand Ballroom

Unallocated Loss Adjustment Expense (ULAE) or All Other Defense Costs (AODC) may suffer from its name, which implies that it doesn't matter or is immaterial – but that's certainly not the case from a pool's perspective. These costs, which can range from 1 to 20 percent of loss reserves depending on the coverage line, have grown noticeably over time. This session will help you appreciate what ULAE includes and why it is relevant. You'll also consider how a pool's operating model and level of coverage will affect this line item and review comparisons to broader commercial industry results.

WEDNESDAY, OCTOBER 5

7:00 AM - 8:00 AM

BREAKFAST

Grand Ballroom I

8:15 AM - 9:00 AM

KEYNOTE

ANTICIPATED CHANGES IN REGULATION OF PUBLIC ENTITY POOLS

Senator Ben Nelson

Grand Ballroom II

Join former Senator Ben Nelson (D-NE) to discuss global and federal regulations, as they stand now and what is expected down the road. Ben Nelson is a former two-term governor of Nebraska (1991-1999) and two-term senator (2001-2013), and he served as CEO of the National Association of Insurance Commissioners from 2013 until January 2016. Senator Nelson will detangle the current framework of federal regulation (Federal Insurance Office) and the pressures felt from global regulation initiatives (Solvency II), helping your pool understand how these overarching initiatives could impact your operations.



WEDNESDAY, OCTOBER 5 - continued

9:00 AM - 10:15 AM

THE GROWING TREND OF WRONGFUL INCARCERATION LAWSUITS

Amy Doyle, Shareholder, Crivello Carlson, S.C. Ben Eggert, Partner, Wiley Rein LLC Rick Spiers, Vice President, Claims, Genesis **Grand Ballroom**

Did you know the national headline case of Steven Avery, which formed the basis of the Netflix series *Making of a Murderer*, was defended by a public entity pool? With technological advancements in DNA testing, legal rights groups are challenging (and overturning) convictions of all kinds dating back decades. Public entity pools, their members, and their reinsurers might be unprepared for the level of compensation payouts to those who have been wrongfully incarcerated – not to mention the media scrutiny and related considerations. This presentation will explore the claims, reinsurance, and member services implications of wrongful incarceration claims, which are more a matter of when, not if.

10:15 AM - 10:30 AM REFRESHMENT BREAK

10:30 AM - 12:30 PM

WEAK SIGNAL TOOLS TO TAKE HOME

Andrew Ranson, Executive Partner, Future Point of View Grand Ballroom

This closing session will help you build the capacity to quickly set up systems and track weak signals you've determined you need to pay attention to. The unique concept of "Rivers of Information" was developed as a way to filter, harness, and manage this massive flow of online information so you can capitalize on it. Learn how to monitor aggregated data over short and long periods of time in a continuous learning environment and put key weak signal lessons immediately into practice. In the past, weak signal research of this depth involved lots of manual steps. But today, using mostly free tool sets, you can quickly set up a system to gather, aggregate and store relevant streams of information and direct it to the places where it's easy for you to consume in bursts, fitting it into your busy schedule. You'll leave this session with a pragmatic understanding of tools to apply in pooling-specific weak signal scenarios that will help you get started building your own Rivers of Information.



CEO PATRON



























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VICE PRESIDENT PATRON





























EXECUTIVE PATRON











































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