



**BIG IDEAS.  
SMALL SETTING.**

# PRIMA INSTITUTE 2024

**The Industry's Premier Risk  
Management Educational Program**

**October 21-25 // Scottsdale, AZ**

PRIMA Institute 2024 (PI24) is an innovative educational symposium comprised of fundamental risk management curriculum, outstanding faculty and excellent networking opportunities.

PI24 is aimed at new and seasoned risk management professionals who want to learn more about emerging trends and best practices.



**Register at**  
**[institute.primacentral.org](https://institute.primacentral.org)**

# ENHANCE YOUR PUBLIC RISK MANAGEMENT SKILL SET AND JOIN YOUR PEERS AT THE 2024 PRIMA INSTITUTE!

## PI ATTENDEES ENJOY THE FOLLOWING BENEFITS:



- **100, 200 and 300 Level Sessions**

Sessions that become increasingly rigorous provide an excellent platform for attendees to learn and build their risk management skill set.



- **Educators Who Are Leaders in the Industry**

Instructors are subject matter experts and risk management practitioners who innovate teaching styles to engage and develop attendees.



- **Collaborative Learning**

Classroom instruction with interactive group learning offers attendees an opportunity to flourish in a holistic educational experience. Each day begins with an interactive information exchange with peers.



- **Customized Experience**

Daily themed tracks frame this intense risk management training, allowing participants to attend specific days or focus on select sessions according to their learning needs.



- **Network Outside the Classroom**

Casual networking events allow attendees and faculty members to build valuable professional relationships that reach beyond the classroom.



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[institute.primacentral.org](https://institute.primacentral.org)



# MONDAY, OCTOBER 21

## Day One • 100 Series

### BUILDING A CULTURE OF RISK MANAGEMENT

This entertaining and educational session will motivate you to build an environment where employees feel empowered to protect not only themselves but each other. Videos will drive specific points in building a sustainable culture with audience participation. Personal stories will help the audience engage in how we impact each other through a decision of attitude, positive or negative. Leave this presentation inspired, recharged and ready to make an impact!

**Speaker:** Dean Coughenour, ARM, City of Flagstaff, AZ (Ret.)

### COMMUNICATING FOR GREATER INFLUENCE

How many of your team members are fully engaged in their work? National studies indicate that as much 70% of the American workforce is disengaged in their job. What are some of the costs of disengagement? Productivity, safety, customer satisfaction, and profitability all go down, while absenteeism, conflict, stress, and turnover all go up. If any of these challenges sound familiar, this session can help.

**Speaker:** Randy Anderson, CSP, E3 Professional Trainers

### YOU'RE THE RISK MANAGER; NOW WHAT?

This panel discussion will include real-life stories from risk managers on how they navigate the day-to-day opportunities associated with being "the Risk Manager." Participants are encouraged to bring questions and scenarios to discuss with the panel.

#### Speakers:

Amy Larson, JD, ARM, City of Bloomington, MN  
Michelle Jordan, Clayton County Water Authority  
Jennifer Hood, City of Montgomery, TN  
Maria Robinson, City of Flagstaff, AZ

### BUILDING A SAFETY PROGRAM WITH EFFECTIVE SAFETY COMMITTEES

The purpose of this presentation is to present guidelines for establishing an effective safety committee at many levels of a government entity. Up for discussion will be committees at the division/department level, standing committees focusing on specific purposes, and committees that may emerge situationally or as a change in policy. Some of the most critical requirements of any committee are to continuously engage committee members, encourage participation and stay focused on the goals of the committee's purpose. This presentation will assist you with having a successful committee and avoid the perils that can create failure.

**Speaker:** Dan Hurley, City of Chesapeake, VA (Ret.)

### RISK CONTROL 101

Risk control is the cornerstone of almost every risk management program. However, without the correct framework in place to understand the "why" and "who should be involved" in the implementation of the program, your efforts may not be successful. This presentation will discuss the steps needed to build a framework for effective risk control that will meet your entity's risk management goals.

#### Speakers:

Amy Larson, JD, ARM, City of Bloomington, MN  
Sarah Curtis, Public Entity Partners

### HOW TO READ AND EVALUATE INSURANCE INDUSTRY LOSS RUNS

Insurance industry loss runs are used by many people and organizations for different purposes. In this session, we will review the data fields captured on most insurance industry loss runs and discuss the value of this information for different parties supporting your risk management program. We will also share opportunities for applying the information contained in loss runs to improve your safety and risk management efforts and, ultimately, your total cost of risk.

**Speaker:** David Weightman, PMA Companies

# TUESDAY, OCTOBER 22

## Day Two • 200 Series

### LOOKING BACK, LOOKING FORWARD: WHAT'S NEW IN EMPLOYMENT LAW?

It is an increasingly challenging time to be a public employer. Social, political and legal trends inevitably spill into the workplace. This presentation will focus on recent legal developments in employment law from court cases and legislative actions and trends, and discuss the risks and challenges associated with managing employees in the midst of during and after election.

#### Speakers:

Jess Osborne, Miller Nash LLP  
Liani Reeves, Miller Nash LLP

### CIVILITY STARTS WITH YOU

As risk managers in our organizations, we have a responsibility to prevent harassment in the workplace. Studies show us that creating a culture of civility is an effective way to reduce harassment and other forms of discrimination. In this session, we will focus on self-awareness, the importance of embracing inclusion and the power of empathy. These topics will challenge us to consider our role in creating a work environment in which everyone feels safe, included and able to be productive at work.

**Speaker:** Sarah Curtis, Public Entity Partners

## SPECIAL EVENTS

Special events can present special and unusual types of risks for your entities. They enrich the lives of a community, attract interest in local businesses, increase sales tax revenue and, at times, tax the patience of government as it serves and protects. In this interactive presentation, the speaker and attendees will provide examples of special events and, as a group, will discuss risk transfer options, including the use of permits, risk transfer, insurance and the use of waivers as well as discussing lessons learned in association with these special events.

**Speaker:** Amy Larson, JD, ARM, City of Bloomington, MN

## A NEW GENERATION IN POLICING: THE USE OF TECHNOLOGY, ARTIFICIAL INTELLIGENCE AND DATA-DRIVEN RESEARCH IN RISK MANAGEMENT

Public perception of law enforcement has hit a record low, with many people showing a decreased confidence in law enforcement and training initiatives. Technology in policing and AI are rapidly developing. In this session, we will examine the impact of legal analytics, artificial intelligence and data-driven research, and its impact on shaping a new era in public service.

### Speakers:

Courtney Ramirez, Alliant Insurance Services, Inc.  
Keith Hummel, J.A. Montgomery Consulting

## WHAT INSURANCE DO YOU WANT IN YOUR CONTRACT?

Effective transfer of risks associated with contracted work is an essential component of any risk management program. Failing to obtain the appropriate hold-harmless agreement or insurance documentation can leave you paying the bill for someone else's negligence or error, costs your agency could have avoided. Participants will learn a process for effective contractual risk transfer, including how to identify good and bad hold-harmless agreements, questions for identifying and prioritizing your risks, insurance specifications to get you the protection you need with the least hassle, and how to verify what you receive is what you asked for. Participants will receive sample specifications, forms and checklists to assist them in their efforts. Also included will be reference to a comprehensive manual for public entities that can be accessed on the internet.

**Speaker:** Courtney Ramirez, Alliant Insurance Services, Inc.

## CERTIFICATE OF INSURANCE MANAGEMENT

Certificate of insurance (COI) management is essential to risk mitigation and is a process by which an organization manages contracts and COIs to effectively transfer risk and liability to contractors or service providers to reduce exposures to their entity. In this session, the management of certificates of insurance will be examined to include types of certificates, additional insured language, certificate validation and tracking, required coverage limits, contract scope of work, and effective methods for transferring risk to contractors and service providers.

**Speaker:** Amy Larson, JD, ARM, City of Bloomington, MN

# WEDNESDAY, OCTOBER 23

## Day Three • 200 Series (cont.)

### THE ART OF STORYTELLING: MAXIMIZING YOUR RENEWAL

Join us to uncover the art of storytelling in the context of public entity insurance. Learn how to construct a narrative in the insurance marketplace that highlights your entity's unique attributes, proactive risk management approaches and commitment to financial prudence. Explore techniques to make your story resonate, ensuring it is honest, memorable and persuasive to all involved.

**Speaker:** Marcus Henthorn, Arthur J. Gallagher & Co./RPA

### ENGAGE TO BE EFFECTIVE: ERM INTERACTIVE WORKSHOP

Learn how to engage teams and create demand for enterprise risk management (ERM) by joining us for an interactive ERM risk assessment workshop. Participate in a scenario analysis to reveal how communication and prioritization of risks are connected through the enterprise for better understanding and decision making. Inclusion and diverse perspectives are essential to face the complexity of risk today. Experience how we put it all together using human-centered design (HCD) integrated with the best techniques and tools from top psychologists and social behaviorists.

**Speaker:** Mel Thomson, City of Phoenix, AZ

### BUILDING A ROBUST RISK MANAGEMENT PROGRAM

This session will discuss the evolution of a robust risk management program, discussing the various elements involved. Attendees will consider critical steps in the process of building a program and identify methods for evaluating their program.

### Speakers:

Carleen Patterson, ARM, ARM-P, CIC, CRM, Alliant Insurance Services, Inc.  
Lori Gray, Prince William County, VA

### STATE OF THE MARKET: EMERGING TOPICS FOR 2025 AND BEYOND

This presentation will provide perspective on what is emerging as a risk with a focus on risks of most concern to the public sector. We will explore the factors leading to the elevation of this risk as well as the implications for risk control or risk financing solutions.

**Speaker:** John Chino, ARM-P, ARM-E, CSR, Arthur J. Gallagher & Co.

### RISK-INFORMED DECISION-MAKING: ALIGNING APPETITE, TOLERANCE AND STRATEGY

Risk appetite, tolerance and strategy are frequently discussed in the risk management field. In this session, we explore these three concepts and discuss how effectively aligning them can improve risk management and decision-making while fostering a resilient risk culture.

**Speaker:** Shannon Gunderman, CPCU, ARM, AIS, CWCP, Arthur J. Gallagher & Co.

## CURRENT TRENDS IN WORKERS' COMPENSATION

The workers' compensation landscape for public entities has traditionally been slow to evolve, but that is changing. In this session, our presenters will cover the surprisingly rapidly changing dynamics of the workers' compensation industry. They will discuss the emergence and impact of key trends such as mental injury claims, AI (Assistance Intelligence), wearable technology, remote health care, presumption laws, pharmaceutical trends and inflation. The speakers will also review emerging class codes exposures and loss trends for public entities as well as their impact on your risk portfolio.

### Speakers:

Geoff Jones, Esq., Midwest Employers Casualty  
Tim Bridgeforth, Midwest Employers Casualty

## THURSDAY, OCTOBER 24

### Day Four • 300 Series

### INVESTIGATIVE BUILDING BLOCKS: THE FOUNDATION FOR A SOLID INVESTIGATION

This course outlines the foundation needed to conduct successful claims investigations. Whether you are a seasoned risk manager who regularly investigates claims or someone brand new to the role, this course will educate you about the initial investigative methods needed on suspect claims to build a solid defense and lower claim costs within your organization. We will outline how initial investigations can be low cost but also provide information that is extremely valuable. The presentation provides insight on social media investigations, background investigations, medical canvassing and other tools used by investigators.

### Speakers:

Kayla Guenther, City of Fort Myers, FL  
Marci Reading, CFE, Command Investigations

### NAVIGATING THE FUTURE: AI IN WORKERS' COMPENSATION CLAIM SETTLEMENTS AND ITS IMPLICATIONS FOR PUBLIC ENTITIES

AI innovations are beginning to disrupt traditional workers' compensation claims handling operations. In this presentation, the speakers will explore the advances made in the industry through the use of AI. In doing so, they will review the beneficial impacts, including the potential for improved efficiency, accuracy and cost. As part of the presentation, the speakers will also explore how AI can aid in the settlement of your existing workers' compensation claims.

### Speakers:

Brian Billings, Midwest Employer Casualty  
Geoff Jones, Esq., Midwest Employers Casualty

### ART OF SETTLING CLAIMS

The presentation will provide tools and tips for claims handlers and claims professionals on how to settle claims, strategies, evaluate pros and cons, and understand the benefits of a settled claim. Attendees will learn how to effectively communicate and bolster their negotiation and conflict resolution skills to achieve desired outcomes.

**Speaker:** Ya'Sheaka Williams, Esq., Quintairos, Prieto, Wood & Boyer, PA

## TOTAL COST OF RISK: UNDERSTANDING AND APPLICATION

This presentation is designed to understand total cost of risk (TCOR) as a concept and also how to use it to achieve risk management short- and long-term goals and objectives. Attendees will be able to identify the main TCOR elements, discuss how each element impacts overall TCOR, including claims and premiums, and apply TCOR in several scenarios, including retention analysis, choosing the right insurance renewal option, risk control strategy and vendor selection.

### Speakers:

Carleen Patterson, ARM, ARM-P, CIC, CRM, Alliant Insurance Services, Inc.  
Sheri Swain, Maricopa Community Colleges (Ret.)

## UNDER ATTACK: RESPONDING TO RANSOMWARE

Public entities continue to be a target for threat actors, organizations must prepare their defenses against cyber-attacks. This session will feature a live ransomware simulation and a discussion around best practices for cyber incident response and crisis management.

### Speakers:

Temo Garcia, Aon  
Austin Tippet, Aon

## NAVIGATING THE AI FRONTIER: OPPORTUNITIES AND CHALLENGES IN THE PUBLIC SECTOR

With the arrival of applications like Sora, ChatGPT and Copilot, artificial intelligence has hit the mainstream. While it has been instrumental in problem-solving and creating efficiencies, it has also caused controversy. In this session, we will explore some of the history behind AI, discuss the various ways it can be used and misused, and review its potential in the public sector.

**Speaker:** Shannon Gunderman, CPCU, ARM, AIS, CWCP, Arthur J. Gallagher & Co.

## FRIDAY, OCTOBER 25

### Day Five • 300 Series (cont.)

### PRIMA INSTITUTE 2025 PLANNING

Attendees of PI24 will provide feedback and participate in building the education curriculum of next year's Institute.

### CRISIS COMMUNICATION/EMERGENCY ACTION PLAN

Crisis will occur when we least expect it. Internal and external communication during a crisis differs from normal communication. Organizations need to have a plan for how they will communicate during a crisis. Best practices include "practice like you play" and establishing your everyday operating process to mirror what will happen during a crisis. We will discuss best practices to establish battle rhythms, organizational structure and leadership.

**Speaker:** Jason Stoddard, Charles County (MD) Public Schools

### ADDRESSING PTSD AMONG OUR HEROES

This educational session is a comprehensive program designed to bring awareness, understanding and actionable solutions to the challenges of post-traumatic stress disorder (PTSD) faced by veterans, first responders and individuals in high-stress professions. This session aims to demystify PTSD by exploring its causes, symptoms and the stigma that often surrounds mental health issues in these communities. Through this expert-led discussion, we will examine the latest research, treatment options and support systems available to help our heroes navigate their journey toward recovery. Participants will gain valuable insights into recognizing signs of PTSD in themselves and others and learn how to approach someone who may be struggling. This session will provide practical tools and strategies for resilience and mental well-being, fostering a supportive environment for healing and empowerment. By attending, individuals will be better equipped to support themselves and their peers, encouraging a culture of understanding and compassion.

**Speaker:** Teresa Bartlett, MD, Sedgwick

### TALENT RETENTION AND RECRUITMENT IN A DIVERSE WORKPLACE

Talent determines the success of an organization. While products are important, the people (talent) that completes the team make an internal and external difference, positive or negative. With so many empty seats in public and private businesses post-COVID, the ability to keep current and recruit new talent is an existential threat. How employees are valued, in words and deeds, is key to retention. From professional development to creating a sense of belonging, a commitment to their growth as a person and in their career can offset a few extra dollars elsewhere. Bringing in new talent that is diverse (race, gender, geography, national origin, education, age/generation, ideology, upbringing, socioeconomic and other immutable or cultural traits) means creating an expectation for how they will be assimilated into the team. It also potentially means searching for talent in new places and presenting a better elevator pitch to convince them to choose you. This session will discuss the current challenges in retention and recruitment and offer some recommendations for embracing those challenges as opportunities.

**Speaker:** Mark Pew, WorkCompCollege.com

### FIRST AMENDMENT ISSUES: DO ACTIONS SPEAK LOUDER THAN WORDS?

This session provides a new look at the First Amendment and emerging issues facing law enforcement officers. The presentation will focus on the law that governs the right to protest as well as recognizing and avoiding infringement on an individual's First Amendment rights. We will also talk about defenses to First Amendment retaliation cases and the line between expressive free speech and disruption.

**Speakers:**

Michele Molinaro, Esq., Jones, Skelton & Hochuli, P.L.C.  
Justin Ackerman, Jones, Skelton & Hochuli, P.L.C.

### YOUR BLACK SWAN IS SOMEONE ELSE'S GRAY RHINO

In public safety, problems come at us in all directions, too often leading to tragedy. The concepts of the Black Swan and the Grey Rhino help us differentiate between these problems. Black Swans are the "unknown unknowns" that no one sees coming. Grey Rhinos are massive, obvious problems that we fail to acknowledge. As the title of this program points out, one leader's Black Swan can easily be another leader's Grey Rhino. In this session, the speaker will explain these concepts in more detail and show how they relate to the basic concepts of risk management. Attendees will explore how events that sneak up on organizations and cause tremendous problems have often been experienced by other similarly situated organizations. The speaker will provide strategies for how to more effectively capture and share lessons learned from close calls and tragedies, turning Black Swans into Grey Rhinos that are not only visible but also stoppable.

**Speaker:** Gordon Graham, Lexipol

For more information,  
contact Shaunda Ragland,  
PRIMA's Senior Director, Education & Training,  
at [education@primacentral.org](mailto:education@primacentral.org)  
or 703.253.1261



# ATTENDEE INFORMATION

## REGISTRATION

### REGISTRATION FOR ENTIRE PROGRAM

	Before August 31	After August 31
Member*	\$1,075	\$1,175
Non-member	\$1,575	\$1,675

### 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, or one day.

- Monday through Wednesday, October 21-23: 100 and 200 series
- Wednesday through Friday, October 23-25: 200 and 300 series

	Three Day Rate		Daily Rate
	Before August 31	After August 31	-
Member*	\$785	\$890	\$370
Non-Member	\$1,035	\$1,139	\$450

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

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

### HOTEL INFORMATION

PRIMA Institute will be held at

The Scottsdale Resort at McCormick Ranch  
7700 East McCormick Parkway  
Scottsdale, AZ 85258

#### Special Rate:

\$255 + applicable taxes per night

Book your group rate for PRIMA Institute 2024:

Start Date: Sunday, October 20, 2024

End Date: Saturday, October 26, 2024

Last Day to Book: Friday, September 27, 2024

### NETWORKING AT PI 24

Networking is essential to your success as a professional.

Wednesday, October 23 • Social Hour

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

### SPECIAL ACCOMMODATION REQUEST

Email [meetings@primacentral.org](mailto:meetings@primacentral.org) with your specific needs or check the appropriate box during the online registration process.

### SOCIAL MEDIA

Join your peers in the excitement before, during, or even after #PI24! Connect with your risk management peers and conference attendees through Facebook, X and LinkedIn.

 [linkedin.com/company/prima-central](https://www.linkedin.com/company/prima-central)

 [facebook.com/publicriskmanagementassociation](https://www.facebook.com/publicriskmanagementassociation)

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#PI24



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