PI26
PRIMA INSTITUTE 2026

BIG IDEAS. SMALL SETTING.

PRIMA INSTITUTE 2026

The Industry's Premier Risk Management Educational Program

October 19–23 // Old Town Alexandria, VA

PRIMA Institute 2026 (PI26) is an innovative educational symposium comprised of a fundamental risk management curriculum, outstanding faculty and excellent networking opportunities.

PI26 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

ENHANCE YOUR PUBLIC RISK MANAGEMENT SKILLSET AND JOIN YOUR PEERS AT THE 2026 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 use innovative 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.

Register at
institute.primacentral.org

MONDAY, OCTOBER 19
Day One • 100 Series

YOU'RE A NEW RISK MANAGER, NOW WHAT?
This course is designed for new risk/safety/liability managers and professionals transitioning into a liability-focused role. Moving beyond theory, the information shared will be practical, hands-on and strategic for establishing a visible, approachable and effective risk management culture. Participants will learn how to build essential cross-functional relationships, move from reactive to proactive and leverage "boots on the ground" insights to identify operational hazards. Key takeaways include building a support team, utilizing external resources and empowering employees.

Speaker: Maria Robinson, City of Tucson, AZ

FROM INVISIBLE TO INFLUENTIAL: BUILDING YOUR BRAND IN RISK MANAGEMENT
Risk and safety professionals often work behind the scenes — protecting organizations, reducing hazards and guiding critical decisions. Yet many struggle with visibility and influence despite the value they bring. This session explores how developing a strong personal brand can help risk professionals move from being overlooked to becoming trusted advisors within their organizations. Participants will examine what a brand truly is and why branding is not just for companies - it also applies to professionals. The session will explore how personal brands are formed, how others perceive them, and why a clear and authentic professional identity matters. Attendees will learn how a strong brand can increase influence, open new opportunities, and build credibility with leadership, colleagues and stakeholders. What is your brand — and what does it say about you?

Speaker: Phil Spence, City of Charlottesville, VA

TOTAL COST OF RISK: UNDERSTANDING AND APPLICATION
This presentation is designed to understand TCOR as a concept and how to use it to achieve short- and long-term risk management 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.

Speaker: Carleen Patterson, ARM-P, CIC, CRM, Alliant Insurance Services, Inc.

SHIFTING THE RISK: LEVERAGING SMART INSURANCE REQUIREMENTS FOR EFFECTIVE RISK TRANSFER
Public entities face distinctive challenges when shifting risk to contractors, vendors and partner organizations, especially when taxpayer dollars and statutory responsibilities are at stake. This session examines how well-crafted insurance requirements serve as a primary tool for transferring risk away from the public entity and onto the parties—and insurers—best positioned to manage it. Participants will explore how coverage types, limits and endorsements must align with contract obligations, procurement practices and governmental risk appetites. Through real-world examples involving public works, professional services and community programming, the session highlights common gaps that leave agencies exposed and practical strategies for strengthening insurance provisions. Attendees will gain a clearer understanding of how to protect public resources, reduce liability and ensure that risk is effectively transferred through enforceable, well-designed insurance requirements.

Speaker: Tamika Puckett, Protecdiv, Inc.

WC 101: FROM THE GRAND BARGAIN TO SYSTEM-WIDE CLAIM ADVOCACY
Workers' compensation is one of the most foundational — and misunderstood — areas of public risk management. Built on the historic Grand Bargain, the system was designed to provide timely medical care and income protection for injured employees while offering employers predictability and liability protection. Yet today's outcomes depend on far more than statutes and benefits alone. This engaging 60-minute session provides a practical workers' compensation 101 overview for both new and seasoned public risk professionals. Attendees will explore core components of the system — medical and income benefits, cost containment strategies, litigation and emerging trends — through real-world examples and relatable stories. Special emphasis will be placed on the importance of claim advocacy and system-wide collaboration, illustrating how carriers, employers, healthcare providers, attorneys, regulators and injured employees must work together rather than in silos to achieve the common goal of recovery.

Speaker: Melissa Steger, WorkCompCollege.com

THE LEAGUE OF EXTRAORDINARY PUBLIC RISK MANAGERS
This panel of PRIMA's Public Risk Managers of the Year will help every level of risk professional. New risk managers can learn how to establish a solid program and more seasoned risk managers might leave knowing a few new tricks. These experts come from all different types of public risk (city, county, state, schools, special district utility and air/seaports). They offer implementable strategies with million-dollar impacts. Attendees can learn ways to make risk managers superstars in their organization.

Speakers:
Megan Damato, Esq. Town of Greenwich (CT) and Greenwich Public Schools
Allie Matthews, City of Tucson, AZ (Ret.)
Sean Catanese, King County, WA
Sherri Adams, ARM, WCCA, City of Kansas City, MO
Lori Gray, Prince William County, VA
Jeff Green, County of Larimer, CO
Jess Desmarais, MBA, ARM, TRISTAR

TUESDAY, OCTOBER 20
Day Two • 200 Series

SPECIAL EVENTS
Special events can pose unique risks to your entities. They enrich the lives of a community, attract interest in local businesses, increase sales tax revenue and sometimes 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, discuss risk transfer options, including permits, risk transfer, insurance, and waivers, as well as lessons learned from these special events.

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

FROM COMPLIANCE TO CULTURE: BUILDING HIGH-IMPACT SAFETY COMMITTEES IN PUBLIC ENTITIES

Safety committees can be a valuable risk management tool for public entities, frequently adopted to help manage employee safety, reduce losses and demonstrate organizational commitment to risk control. Yet too often these committees exist in name only—meeting infrequently, lacking authority and producing little measurable impact. This session explores how public entities can move beyond symbolic or checkbox approaches to build safety committees that actively reduce injuries, control workers' compensation costs and strengthen organizational culture. Attendees will learn practical governance models, role clarity, data-driven practices and accountability strategies that transform safety committees into effective, measurable risk management tools.

Speaker: Matthew Phillips, Hanover County (VA) Government and Hanover County Public Schools

EFFECTIVELY COMMUNICATING IN THE MIDST OF CHANGE

Two timeless truths of life: change is constant, and many people have a great aversion to it. Whether you love it or loathe it, you can reduce some of the pain and anxiety by improving communication throughout the process. In this session, you'll learn how to lead your team through change more quickly and painlessly by communicating effectively while it is happening and discover strategies to teach your managers/supervisors to be better leaders and produce better outcomes.

Speaker: Randy Anderson, E3 Professional Trainers

HOW TO EVALUATE AND SELECT A THIRD-PARTY ADMINISTRATOR

Third-party administrators (TPAs) have become integral to the claims management process across public entities. Their specialized expertise and dedicated resources can prove invaluable in managing risk within the organization. Risk management has become increasingly complex and now extends across the entire enterprise, expanding the scope of the program and the range of risks to be managed. Controlling diverse exposures and unique risks is key to a successful claims program and your organization's reputation. This session will discuss how to choose the best TPA partner and how to evaluate their services.

Speakers: Lori Gray, Prince William County, VA
Jennifer Wybourn, Prince William County, VA

MANAGING RISK THROUGH EFFECTIVE SUPERVISION

As the champions of safety directives and the voice of employee safety concerns, first-line supervisors play a crucial role in risk mitigation and accident prevention. In this session, we will discuss the supervisor's role in creating a culture of safety, the positive impact of effective communication, and the importance of motivating your team through constructive leadership while also being a productive manager.

Speaker: Sarah Curtis, Public Entity Partners

THE INTERSECTION OF RISK MANAGEMENT AND PROCUREMENT: MANAGING THIRD-PARTY VENDOR RISK

This training session is designed to provide risk management professionals with practical insights, applied learning, and opportunities to share knowledge and address third-party vendor risks that are often overlooked in public entity organizations. The course offers real-world examples demonstrating how risk management can serve as a value-added partner in the organization's procurement process. Participants will learn when and how to engage risk management during the procurement process, how to establish appropriate insurance requirements for vendors, how to identify and assess contractual risks, how to develop effective contract negotiation strategies, and how to ensure ongoing vendor insurance compliance. Participants will also develop the skills necessary to design and implement an effective process for managing third-party vendor risk.

Speaker: Jeff Green, County of Larimer, CO

WEDNESDAY, OCTOBER 21
Day Three • 200 Series (cont.)

YOUR BLACK SWAN IS SOMEONE ELSE'S GREY 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, we will delve into these concepts 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 affected other similarly situated organizations. The presenter will provide strategies for more effectively capturing and sharing 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

NUTS OR BOLTS? WHICH ONE FIRST?

Now that I am the risk manager, what should I do first? This session will walk you through the step-by-step process, beginning with assessing where you are today. What questions to ask and of whom? What do you prioritize first to gain credibility and visibility inside the organization while building a culture of risk management? Attendees will hear personal stories of pitfalls and how to avoid them, as well as the secret sauce to a successful program.

Speaker: Dean Coughenour, Coughenour Consulting

MENTORING IS NOT A NICE-TO-HAVE

Most workplaces are in flux in 2026 as institutional knowledge retires, internal talent takes on new responsibilities, and recruitment casts a wide net for needed replacements. Professional development is important and should be a hybrid model of formal and informal training, taking into account evolving needs and the use of technology by people and capabilities. However, a low-tech method used by humans throughout history remains key to the process - mentoring. It not only provides education (me start fire, you watch) but also builds relationships, challenges the status quo and creates a common goal. This session will provide best practices of purposeful, not happenstance, mentoring. It will also include a link to resources for how to be the best mentor and/or mentee possible.

Speaker: Mark Pew, WorkCompCollege.com

BURNOUT: NOT WORTH THE RISK

An estimated 70% of employees experience workplace burnout every year. While burnout can take a toll on individuals, it also leads to negative outcomes for your organization. In this session, we will examine how burnout can lead to increased errors, decreased productivity and potentially dangerous behaviors at work. Participants will be able to identify potential warning signs of

burnout and leave with actionable steps to enhance their personal and professional resilience.

Speaker: Sarah Curtis, Public Entity Partners

CLAIMS NEGOTIATIONS/MEDIATION

Negotiation and mediation are critical tools in resolving a wide range of claims, including liability, employment and workers' compensation matters. This presentation will explore practical strategies for preparing, negotiating and mediating claims to achieve balanced and efficient outcomes. Participants will gain insight into evaluating claim strengths and risks, understanding the interests of all parties involved and developing negotiation approaches that promote productive dialogue. The session will also address key elements of effective mediation preparation, including documentation, damages assessment, and managing expectations for claimants, counsel, insurers and employers. Real-world examples will highlight common challenges that arise during negotiations and mediation, along with techniques for overcoming impasses and maintaining professionalism in high-stakes discussions.

Speaker: Ya'Sheaka C. Williams, Quintairos, Prieto, Wood & Boyer, P.A.

AI IN CLAIMS LITIGATION

Artificial intelligence is reshaping the landscape of claims litigation, providing attorneys and claims professionals with rapid insights to drive more accurate, efficient, and strategic decision-making. This presentation explores how AI is currently being integrated into case management, risk evaluation, case prioritization and resource applications. By leveraging automated document review, predictive analytics, and natural language processing, professionals can identify key issues earlier, streamline investigations, and enhance their negotiation posture. Litigation teams are also using AI-powered insights to forecast potential exposure, strengthen settlement strategies, and reduce unnecessary litigation spend. Rather than replacing human judgment, AI is allowing professionals to focus on advocacy, strategy and achieving the best possible outcomes for all stakeholders.

Speakers:
Daniel T. Dalton, Midwest Employers Casualty
Brian Billings, W. R. Berkley

THURSDAY, OCTOBER 22
Day Four • 300 Series

MANAGING EMPLOYEES IN TIMES OF PROTESTS AND TWEETS

Unlike private-sector employees, public employees have First Amendment free speech protections because their employer is the government. Does that mean that public employees can say whatever they want, whenever they want and wherever they want? Are employees' social media posts off limits? This presentation will examine the source of public employees' free speech protections and walk through real-life scenarios to demonstrate when the protections apply and where they end. We will also review how and when public employers can monitor and take corrective action against employees for their social media use, including the recommended components of a social media policy.

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

WHEN THE EXECUTIVE IS THE RISK: GOVERNANCE FRAMEWORKS FOR PUBLIC SECTOR HR LEADERS

Public sector risk managers face a structural challenge that standard HR training was never designed to address: what happens when the source of organizational risk is someone above the HR function? This session equips public entity risk managers with practical, governance-ready frameworks for documenting executive-level misconduct, managing investigations when the accused holds institutional authority, and building escalation pathways that hold even when internal channels have already failed. Drawing on documented municipal case data — including settlement records from city governments — this session makes the financial case for proactive accountability infrastructure and provides attendees with immediately applicable tools.

Speaker: Kimberly Williams, The Fair Faith Project

CONFLICT RESOLUTION

This session is a highly interactive, participant-centered workshop that teaches attendees how to address workplace conflict. Attendees will gain an understanding of what conflict is, why we try to avoid it, and the costs incurred when we do so. The session will also help attendees build a toolkit to address workplace conflict more effectively rather than allowing it to fester.

Speaker: Mauricio Velasquez, Diversity Training Group

EMERGENCY MANAGEMENT

This presentation examines the critical role of public institutions at the local, state, and federal levels in coordinating resources, protecting communities, and ensuring continuity of operations during emergencies. We will analyze the four phases of emergency management: mitigation, preparedness, response, and recovery. The session will also highlight inter-agency coordination, public communication strategies, policy development and the importance of community resilience. Through case examples, this presentation will evaluate lessons learned, governance challenges, and evolving best practices in crisis leadership.

Speaker: Thomas C. Bullock, III, Virginia Risk Sharing Association

WC CLAIM INVESTIGATION: BEST PRACTICES AND HORROR STORIES

This session will feature a discussion of critical investigation steps that must occur at the earliest stages of a workers' compensation claim involving catastrophic injuries and high exposure. The presenter will outline the foundational principles in determining the underlying root cause of the accident, compensability and legal liability, and third-party subrogation. The session blends practical guidance with memorable case examples, giving participants both the tools and the instincts needed to navigate even the most challenging claims.

Speaker: Daniel T. Dalton, Midwest Employers Casualty

FLEET TELMATICS: MAXIMIZING FLEET SAFETY AND OPERATIONAL EFFICIENCY

In this session, the use of telematics will be examined, including capabilities for real-time fleet tracking, driver behavior and performance monitoring, and the importance of data analytics in enhancing modern fleet management and improving operational efficiency and fleet safety. Further, telematics best practices will be discussed, along with employee training and driver coaching opportunities.

Speaker: Julie Waller, MBA, CWCP, MESH, Alliant Insurance Services, Inc.

FRIDAY, OCTOBER 23
Day Five • 300 Series (cont.)

QUANTUM COMPUTING 101 FOR RISK MANAGERS: NAVIGATING OPPORTUNITIES AND THREATS
This session offers risk managers a clear and accessible introduction to quantum computing, focusing on its transformative impact on risk assessment and mitigation. Attendees will learn the foundational concepts of quantum computing. The presentation will address both the opportunities quantum computing presents, such as enhanced data analysis and optimization, and the risks, including the potential disruption of current cryptographic standards and data security protocols.

Speaker: Kelvin Coleman, Route 2 Strategies

AI-DRIVEN RISK FRAMEWORK
This session will examine how artificial intelligence can support and enhance enterprise risk management. We will review some of the core components of AI-driven frameworks, including data analytics, predictive modeling and risk assessment. Attendees will gain insights into the benefits of using AI while also addressing challenges such as data quality, ethical concerns, and implementation barriers. Through practical steps, case studies, and a forward-looking perspective, the presentation will demonstrate how to harness AI for smarter, more proactive risk management strategies.

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

ERM CASE STUDY
In this session, the enterprise risk manager for King County, WA, will share real stories about using Enterprise Risk Management (ERM) to make progress on persistent and emergent challenges. The session describes how ERM helps decision-makers see risks across the whole organization, not just in their own departments. Participants will hear examples of how public-sector organizations have used ERM to address their highest-priority risks and turn uncertainties into opportunities. Each story will show how different groups worked together, used data and good judgment, and stayed focused on the organization's goals.

Speaker: Sean Catanese, King County, WA

RMIS: NOT ANOTHER SPREADSHEET
Risk Management Information Systems (RMIS) are an important tool for any risk manager or risk management program. In this session, we will review what a risk management system is and why an RMIS is important to a risk management program. We will review the core features of most RMIS systems and opportunities to integrate data produced by RIMS applications into an organization's operating metrics.

Speaker: David Weightman, PMA Companies

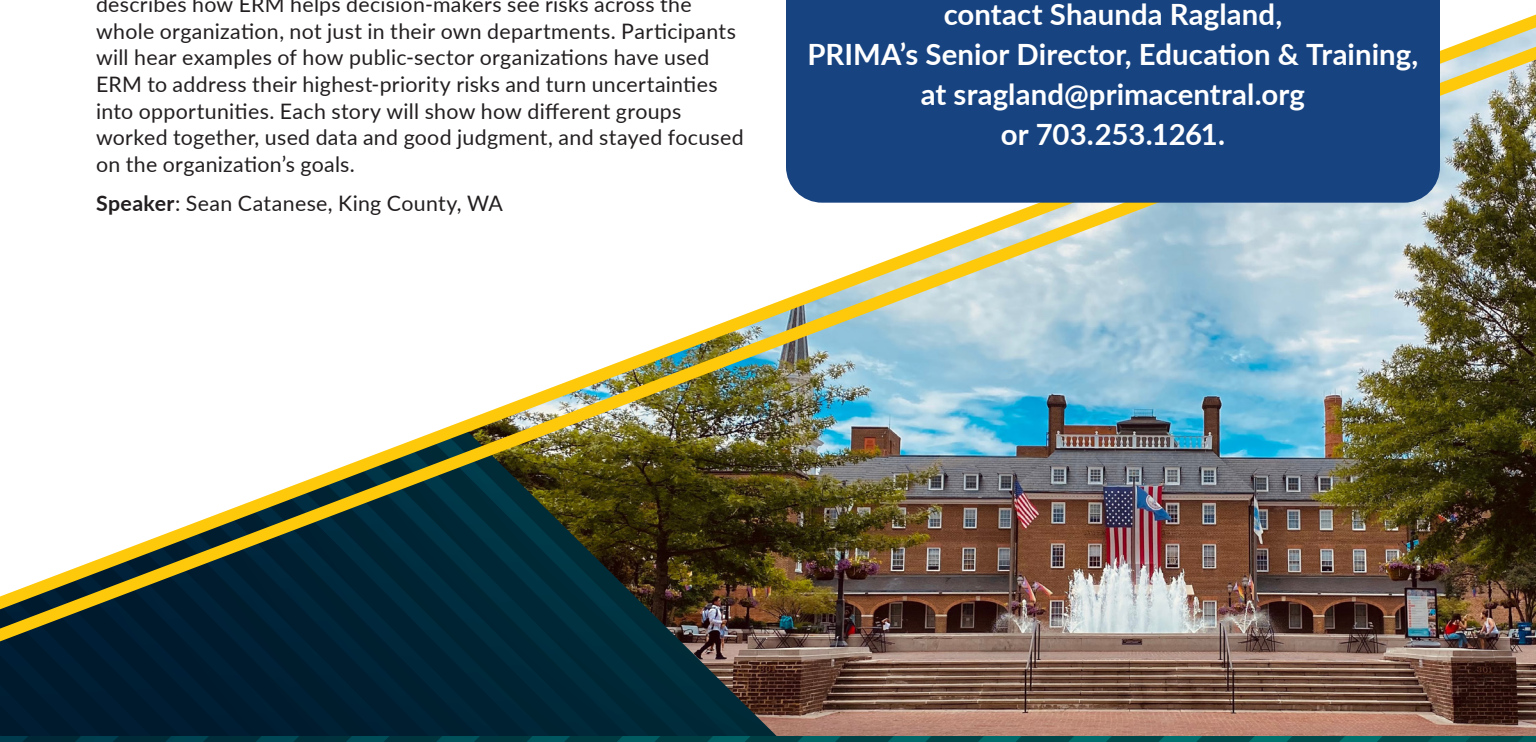
PROACTIVE CRISIS COMMUNICATION
Crisis rarely arrives with warning. When it does, internal and external communications shift dramatically from day-to-day operations. Organizations that respond effectively do so because they have a clearly defined, practiced communication strategy already in place. This presentation explores how to build and sustain a crisis communication framework grounded in the principle of "practice like you play." Participants will learn how to align everyday operating procedures with crisis protocols so that structure, decision-making and messaging remain steady under pressure. We will examine best practices for establishing battle rhythms, clarifying organizational roles and structure, and strengthening leadership presence to ensure coordinated, confident communication when it matters most.

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

STATE OF THE MARKET: EMERGING TRENDS FOR 2027
This presentation will explore the property, liability, cyber, professional, and workers' compensation sectors. Also up for discussion are emerging risks in the public sector, providing attendees with a clear picture of priorities for 2027.

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

For more information, contact Shaunda Ragland, PRIMA's Senior Director, Education & Training, at sragland@primacentral.org or 703.253.1261.



REGISTRATION

REGISTRATION FOR ENTIRE PROGRAM

	Before August 31	After August 31
Member*	$1,200	$1,300
Non-member	$1,700	$1,800

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 19-21: 100 and 200 series
- Wednesday through Friday, October 21-23: 200 and 300 series

	Three Day Rate		Daily Rate
	Before August 31	**After August 31**	-
Member*	$910	$1,015	$495
Non-Member	$1,160	$1,264	$575

*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 Wednesday networking event.

HOTEL INFORMATION

PRIMA Institute will be held at
Hilton Old Town Alexandria
1767 King Street
Alexandria, VA 22314

Special Rate:
$249 + applicable taxes per night

Book your group rate for PRIMA Institute 2026:
Start Date: Sunday, October 19, 2026
End Date: Friday, October 23, 2026
Last Day to Book: Friday, September 25, 2026

NETWORKING AT PI26

Networking is essential to your success as a professional.

Wednesday, October 21 • Networking Event
PI participants will take part in a fun-filled networking event.

SPECIAL ACCOMMODATION REQUEST

Email 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 #PI26! Connect with your risk management peers and conference attendees through Facebook, X and LinkedIn.

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