



# INTRODUCTION

Hello,

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

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

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

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

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

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

Sincerely,



Rick Brush

Chief Member Services Officer



# CONSULTANTS

(Click on a name below to read Consultant Profile)

## Accounting/Risk Finance

Heather Thomson, CPA.....	7
Rebekah Winger.....	17

## Claims Management

Bob May .....	1
Carole McCulley .....	2
Charles Mitchell.....	3
Jamelle Peck .....	8
Jiles Smith .....	10
Marco Sandoval.....	13
Norman Peterson .....	15
Sheila Shanahan .....	20
Sherri Adams.....	21
Steve Wilmes.....	24
Tom Phillips .....	25
Trelawney "TJ" Kitchen.....	26

## Human Resources

Bob May .....	1
Carole McCulley .....	2
Dr. Karla Rhay .....	12
Reanette Fillmer .....	16
Dr. Scott Mann.....	19
Sheila Shanahan .....	20
Sophia Meyer .....	22

## Information Technology

Jeffrey Scheel.....	9
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## Risk Control

Jiles Smith .....	10
Dr. John Preston.....	11
Marco Sandoval.....	13
Robert Romero .....	18
Dr. Scott Mann.....	19
Sheila Shanahan .....	20
Sherri Adams .....	21
Stephen Hackett.....	23
Steve Wilmes.....	24

## Risk Management

Bob May .....	1
Carole McCulley .....	2
Charles Mitchell.....	3
Daniel Delac .....	4
Gail Kiyomura .....	5
Gerry Preciado .....	6
Jamelle Peck .....	8
Jiles Smith .....	10
Dr. John Preston.....	11
Dr. Karla Rhay .....	12
Marco Sandoval.....	13
Maury De Bont.....	14
Rebekah Winger.....	17
Robert Romero .....	18
Sheila Shanahan .....	20
Sherri Adams .....	21
Steve Wilmes.....	24
Tom Phillips .....	25
Trelawney "TJ" Kitchen.....	26

# BOB MAY

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: 6 MONTHS +

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/ Memberships:

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

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

### Work History:

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

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

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

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

# CAROLE D. MCCULLEY

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY +

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/Memberships:

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

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

### Work History:

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

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

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

# CHARLES MITCHELL

Geographic Area Preferred: STATEWIDE (on-site only)

Assignment Length Preferred: 6 MONTHS OR LESS

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/Memberships:

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

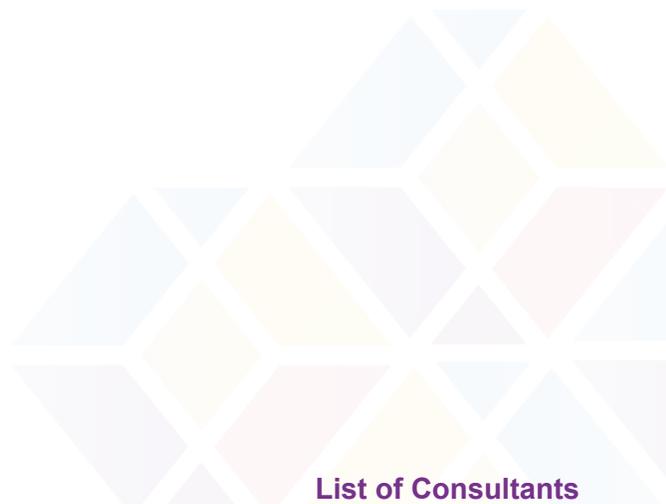
Service Area		Rates (per hour)	Years of Experience
Claims Management	Liability Claims Manager	\$150-175	30
Risk Management	Risk Manager	\$150-175	38
	Risk Analyst	\$150-175	38

## Work History:

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

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

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



List of Consultants

# DANIEL DELAC

Geographic Area Preferred: ANY (remote preferred)

Assignment Length Preferred: ANY

### Experience/Titles Held:

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

### Education:

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

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

### Work History/Experience:

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

**List of Consultants**

# GAIL KIYOMURA

Geographic  
Area  
Preferred:  
NOR CAL

Assignment  
Length  
Preferred:  
1-6 MONTHS

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/ Memberships:

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

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

### Work History:

Experienced risk manager for over 35 years in various industries:

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

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

### Skills include:

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

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

# GERRY PRECIADO

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/Memberships:

- State Bar No. 187348 - Inactive

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

## Work History:

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

## Conflict Resolution:

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

## EPL Training:

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

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

[List of Consultants](#)

# HEATHER THOMSON, CPA

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: 1 month+

### Experience/Titles Held:

- Chief Financial Officer
- Director of FP&A
- Controller
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### Education/License:

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

### Professional/Community Involvement:

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

### Formerly served:

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

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

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

### Work History:

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

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

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

[List of Consultants](#)

# JAMELLE PECK

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: 1 MONTH+

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/Memberships:

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

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

### Work History:

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

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

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

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

# JEFFREY SCHEEL

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/Memberships:

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

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

## Work History:

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

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

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

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

### Horizontal Services

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

### Vertical Markets

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

List of Consultants

# JILES SMITH

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

## Experience/Titles Held:

### Government

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

### Private Industry

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

## Education:

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

## Certifications/Licenses/Awards/

### Memberships:

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

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

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

## Work History:

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

His experience includes the following:

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

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

[List of Consultants](#)

# DR. JOHN PRESTON

Geographic Area  
Preferred:  
SOUTHERN CALIFORNIA & VIRTUAL

Assignment Length  
Preferred:  
1-6 MONTHS

## Education:

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

## Degrees:

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

## Certifications/Licenses/Awards/Memberships:

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

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

## Work History:

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

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

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

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

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

[List of Consultants](#)

# DR. KARLA RHAY

Geographic Area  
Preferred:  
STATEWIDE

Assignment Length  
Preferred:  
6 MONTHS  
OR LESS

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/

#### Memberships:

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

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

### Work History:

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

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

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

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

# MARCO SANDOVAL

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/Memberships:

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

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

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

## Work History:

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

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

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

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

List of Consultants

# MAURY DE BONT

Geographic  
Area  
Preferred:  
ANY (remote  
preferred)

Assignment  
Length  
Preferred:  
ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/ Memberships:

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

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

## Work History/Experience:

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

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

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

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

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

List of Consultants

# NORMAN PETERSON

Geographic Area Preferred: COUNTRYWIDE

Assignment Length Preferred: 1 WEEK +

### Experience/Titles Held:

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

### Education:

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

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

# REANETTE FILLMER PHR, CLRM

Geographic  
Area  
Preferred:  
NORTHERN  
CALIFORNIA,  
VIRTUAL &  
STATEWIDE

Assignment  
Length  
Preferred:  
ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/

### Memberships:

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

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

## Work History:

### Veteran HR Expert:

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

### Labor Relations Specialist:

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

### Leadership Excellence:

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

### Executive Coach and Team Developer:

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

[List of Consultants](#)

# REBEKAH WINGER

Geographic Area Preferred: NORTHERN CA and REMOTE

Assignment Length Preferred: 3 months or less

### Experience/Titles Held:

- Underwriting Manager
- Underwriting Analyst
- Accountant

### Education:

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

### Certifications/Licenses/Awards/Memberships:

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

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

### Work History:

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

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

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

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

# ROBERT ROMERO

Geographic Area Preferred: SOUTHERN CA

Assignment Length Preferred: 1-6 MONTHS

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/

### Memberships:

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

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

## Work History:

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

## Experience:

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

List of Consultants

# DR. SCOTT MANN

Geographic  
Area  
Preferred:  
STATEWIDE

Assignment  
Length  
Preferred:  
ANY

## Experience/Titles

### Held:

#### Public Sector

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

#### Private Sector

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

#### U.S. Navy

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

#### Education:

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

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

## Work History

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

### Highlights of Experience include:

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

### Service on Boards and Commissions include:

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

### Certifications

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

[List of Consultants](#)

# SHEILA SHANAHAN

Geographic Area Preferred: NORTHERN/SOUTHERN CALIFORNIA & VIRTUAL

Assignment Length Preferred: ANY

### Education:

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

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

### Work History:

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

Sheila's experience and skill set includes the following:

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

# SHERRI ADAMS

Geographic Area Preferred: COUNTRYWIDE

Assignment Length Preferred: ANY

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/Memberships:

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

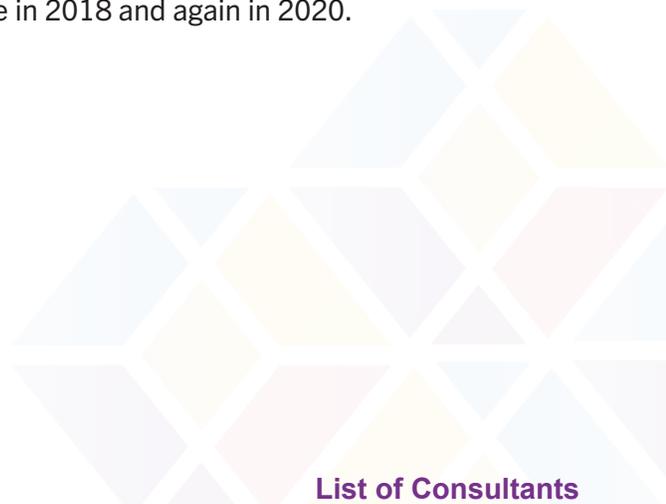
Service Area		Rates (per hour)	Years of Experience
Claims Management	Return-to-Work Coordinator	\$100-125	12
Risk Control	Safety & Loss Control Analyst II	\$75-100	14
Risk Management	Risk Manager	\$100-125	7
	Risk Analyst	\$100-125	14

### Work History:

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

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

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



List of Consultants

# SOPHIA R. MEYER

Geographic Area Preferred: NORTHERN CALIFORNIA & VIRTUAL

Assignment Length Preferred: ANY

### Education:

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

### Specialized Trainings:

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

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

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

### Work History:

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

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

# STEPHEN HACKETT

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/Memberships:

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

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

## Work History:

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

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

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

List of Consultants

# STEVE WILMES

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: ANY

## Experience/Titles Held:

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

## Education:

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

## Certifications/Licenses/Awards/Memberships:

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

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

## Work History:

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

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

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

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

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

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

# TOM PHILLIPS

Geographic Area Preferred: STATEWIDE

Assignment Length Preferred: 1 WEEK +

### Experience/Titles Held:

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

### Education:

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

### Certifications/Licenses/Awards/

#### Memberships:

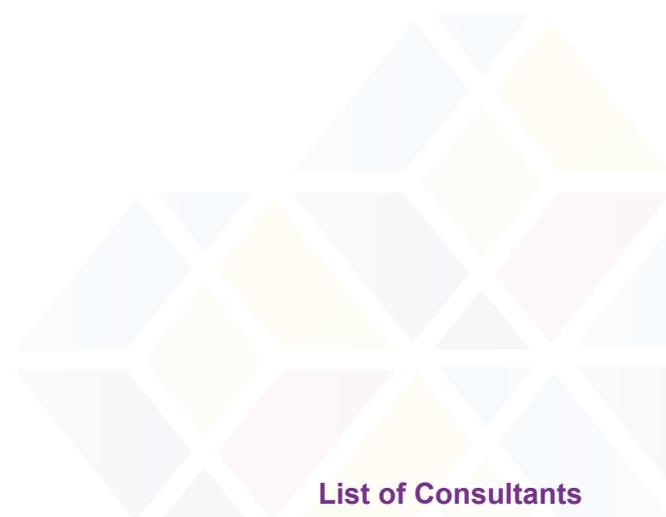
- RIMS, PRIMA, PARMA and MISC Seminars and Conferences
- PRIMA National President: 1990-91
- ACCEL President: 1989-90, 1995-97, 2002-04
- ASCIP Executive Committee: 1984-86
- PRISM Committees: Board, CPEIA, Legislative & Property
- IEA Instructor: Risk Management Courses

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

### Work History:

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

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



List of Consultants

# TRELAWNEY “TJ” KITCHEN

Geographic  
Area  
Preferred:  
STATEWIDE

Assignment  
Length  
Preferred:  
1 WEEK +

## Experience/Titles Held:

- Attorney
- Senior Associate/Associate
- Corporate Counsel

## Education:

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

## Certifications/Licenses/Awards/

### Memberships:

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

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

## Work History:

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

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

## Litigation and litigation management experience:

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

## Contract review experience:

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

[List of Consultants](#)