Monday, October 16

9:00 – 11:30 am

**New Staff Orientation**

Bo Joseph, Subrogation Manager, TML

Intergovernmental Risk Pool & Chris Krepcho, Associate Director, Florida Municipal Insurance Trust

Panelists:

- Ed Bantel, Underwriting Program Manager, Southwest Risk (Arizona Municipal Risk Retention Pool)
- Dan Greensweig, Director, LMCIT
- Ian C. Ridlon, Esq., Pool Administrator, Rhode Island Interlocal Risk Management Trust

This session provides an introduction for newer staff to important concepts, functions, and areas of focus in local government risk pooling. We will explore the origins of pooling, various coverages provided by pools, the benefits of pool membership compared to the commercial market, underwriting approaches, and other operational issues. A panel of experienced pool and league staff will discuss the different pool structures and approaches, including different delivery service models, managing competition, capital structures, decision-making considerations, and core functions within their pool.

10:15 – 11:30

**Lessons Learned from Disasters Like Harvey**

Mike Merz, Enterprise Relationship Manager, Agility Recovery

In light of the recent hurricanes and other natural disasters throughout North America, this session will provide an opportunity for current and prospective members of Agility’s Disaster Recovery Program to learn both about best practices and lessons learned from recent events, as well as the latest developments on Agility’s Disaster Recovery Program.

**Beyond Online Training: How Can Pools Create a Community of Learning?**

Tony Green, Director of Operations, LocalGov U

E-learning is continuously evolving, gaining momentum as a proven resource to pools to help mitigate risk and control losses. In this session, we’ll discuss the evolution and future of training and e-learning in local government and explore examples of how pools have implemented learning solutions uniquely designed not just to meet but exceed needs and expectations of their members. We will also discuss the future trends of learning with insight into how NLC-RISC pools can collaborate collectively to create a community of learning.
12:30 – 1:00 pm

Meet & Greet

1:00 – 2:30

Welcome & Opening General Session:

Getting to Yes: Negotiating Successful Outcomes in Pool Operations
Welcome: Stephanie Osborn, Director, Strategies and Partnerships, National League of Cities
Speaker: Victoria Humphries, Senior Consultant, Willis, Towers, Watson

Regardless of role, we all encounter situations where we need others to say “Yes!” We can refer to this as negotiating, selling, influencing, persuading, but it all comes down to having the other party agree to our ideas, solutions, suggestions, etc. During this interactive session, we will look at three key attributes that successful negotiators exhibit to help them achieve successful outcomes. In diving deep into these characteristics, participants will be provided with tips and techniques to enhance their own understanding and skills in these areas.

2:45 – 4:00

Getting the Most from Your Pharmacy Benefit Management Program
Court Orsborn, President, Donn & Company

This session will provide both health and work comp members with objective, insider intelligence on PBMs. Learn competitive pricing and service standards, the most common pitfalls in buying/managing PBM services, and effective techniques for optimizing PBM performance. Members will walk away with a working knowledge of how to extract superior performance from their PBM programs.

“You Know They Will Happen” Preparation for and Strategic Handling of High Profile Claims
Russell Godin, Director of Claims, Rhode Island Interlocal Risk Management Trust; David Ives, CEO, Northshore International Insurance Services; Lynn McNamara, Executive Director, Citycounty Insurance Services (CIS)

Many RISC members have experienced High Profile/High Exposure claims: officer-involved shootings, wrongful incarceration, property catastrophes, multiple claimant deaths, and others. From their experiences and perspectives, a Pool Administrator, a Claims Director, and a Reinsurer will discuss strategies to prepare for and resolve the most challenging and public claims.

Key Considerations in Pricing Coverage
Chris McKenna, Vice President and Actuary, NLC Mutual

In this fun and highly interactive session, we will work through case studies for both primary and reinsurance pricing, while sharing insights into the concepts of credibility, benchmarking, and loss trend, and how each of these could be considered within the pricing function. No prior expertise needed for this accessible, enjoyable session.
4:15 – 5:30

Innovative Risk Management Programs
Sheri Reintjes, Branch Vice President, Southwest Risk (Arizona Municipal Risk Retention Pool); Fred Satink, Manager of Underwriting, Safety & Health Promotion, VLCT Insurance & Risk Services; William J. Sims III, General Counsel, Arizona Municipal Risk Retention Pool

A core value proposition of pooling is the emphasis on innovative risk management approaches that help members avoid and mitigate claims. This session will discuss two pools’ approaches to delivering this value. You will hear about a unique approach to injury prevention through fitness programming, and also learn about a program for early intervention and assistance in various exposure areas, including land use, employment (EEOC and post termination appeals), workers’ compensation triage, law enforcement, and intergovernmental agreements.

How to Help Your Trustees Fulfill their Investment Responsibilities
Alton Cogert, President & CEO, Strategic Asset Alliance

No matter how ‘conservative’ an investment portfolio may be, it is important that trustees view the entire investment process as a crucial part of the overall operations of the risk pool. Considering investment goes beyond reviewing performance. It means understanding the key issues and risks faced by all pools as they develop, measure, and monitor an investment process focused on supporting the pool’s overall mission. Mr. Cogert will also discuss Strategic Asset Alliance’s experiences in working with many NLC-RISC members.

The Making of Successful Employee Benefit Programs for Local Governments: Key Ingredients for Helping Your Members Navigate the Complex World of Healthcare
Moderator: Erin Rian, Director of Member Services, NLC Mutual
Panelists: Aaron Carper, Director of Group Health, Florida League of Cities; Dave Sichel, Deputy Director, Risk Management Services, Vermont League of Cities and Towns; Carol Wilmes, Director of Member Pooling Programs, Association of Washington Cities

This session will explore the different approaches pools use to meet their members’ employee benefit needs. Hear from fellow pools about the key ingredients in health pool success, and how the closing of a health pool can be used as an opportunity to expand and enhance loss control services for pool members. Whether you have an established health pool, are considering forming one, or provide employee benefit assistance to your members in other ways, this session will provide an opportunity to discuss the changing healthcare market, how pools can work together, and strategies pools can deploy to help members navigate this complex and changing environment.

5:30 – 6:30

Welcome Reception
Tuesday, October 17

7:30 – 8:30 am

Breakfast Buffet

8:00 – 9:15

Breakfast Think Tanks (Round Tables)
• Loss Control Think Tank – Cheryl Lees, Manager of Loss Control Services, PennPRIME Insurance Trust
• Health Care Think Tank – Beverly Lakey, Employee Benefit Trust Manager, Association of Washington Cities
• Underwriting Think Tank – Larry Peck, Risk Manager, Risk Management Services, Michigan Municipal League

9:30 – 10:45

General Session:

RIVERS OF INFORMATION®:
Leverage Technology to Feed Your Brain
Andrew Ranson, Executive Partner, Future Point of View

We will start by focusing on why it is so critical in today’s economy to be learning constantly. Next, we’ll take a look at some very simple but powerful techniques as well as a process and a number of tools to use to apply the techniques for massively increasing the velocity with which you can acquire new and relevant knowledge. The methods and techniques we will share can help you be (or remain) one of the smartest ones in the room, and can have a big impact on your career trajectory.

11:00 am – 12:15 pm

RIVERS OF INFORMATION®:
Implementation Tips, Tricks, and Practical Application
Andrew Ranson, Executive Partner, Future Point of View

This session will take the next step beyond what was shared in the general session. We will work on the practical aspects of implementing the RIVERS OF INFORMATION® techniques, take time to do some of the practical thinking to get your initial river set up, and discuss several tactics and tools for building very targeted information streams.

Actuarial 101
Chris McKenna, Vice President and Actuary, NLC Mutual

In this highly interactive session, we will work through case studies on a variety of topics that will introduce audiences to the following actuarial concepts:
• Pricing segmentation and how to avoid adverse selection in competitive environments
• Loss reserving methodologies, illustrated by predicting NFL victories in a season
• Credibility and “big data” – how insufficient data can lead to biased conclusions, illustrated by estimating value of a free agent in baseball

You don’t have to be an actuary, or even an underwriter, to enjoy this session!
“Am I Being Detained or am I Free to Go?”—Citizen Activists and the 1st & 4th Amendments
Scott D. MacLatchie, Partner, Womble Carlyle Sandridge & Rice, LLP

Police officers are increasingly encountering people boldly asserting what they think are constitutional rights guaranteed by the First and Fourth Amendments. This session will address the thorny liability issues surrounding police officer reaction to refusal to identify, refusal to answer questions, profanity towards officers, filming of police activity and police facilities, and the seizure of cameras or cell phones that have recorded police activity.

12:15 – 1:30
Lunch & Annual Business Meeting

1:45 – 3:00
General Session:

The Augmented Age: How to Think About the Rise of AI and Its Implications
Chris Willis, VP, User Experience, Domo

In this session, attendees will learn new and helpful ways for thinking about artificial intelligence (AI), how AI can positively impact their organizations, grasp the inner workings of deep learning, and hopefully, sensitize them to the unintended consequences of this new technology.

3:15 – 4:30
Changing the Conversation: Telling Your Pool Story Through Enhanced Data Visualization Tools
Facilitator: Ryan Draughn, Director of Information Technology, NLC Mutual
Panelists:
• Dan Hess, Chief Executive Officer, VIZADATA
• Jill George, Business Analyst, Vermont League of Cities and Towns
• Chris Willis, VP, User Experience, Domo

This session will explore how pools can use scalable deep learning and business intelligence tools to discover hidden insights about your organization’s data beyond the traditional models and spreadsheets. Learn how pools are looking to change the conversation with their board, internal staff, and members by placing their data into a visual context designed to help stakeholders better understand complex data and support decision-making.

Managing Your Pool’s Exposure to Employment Practices Liability
Brian Dickey, CPCU, Director of Loss Control, Suzanne Reed, CIC, Underwriting Manager & Ned Wertz, Director of Claims CPCU, KLC Insurance Services

Employment Practices Liability is one of the most costly exposures faced by pools and their members. The directors of underwriting, loss control, and claims for the Kentucky League of Cities Insurance Services will discuss how KLCIS has responded to this key exposure, and lead a discussion among other attendees about their pools’ approaches and how to integrate management of this exposure across different functional areas. Come prepared to share your pool’s approaches and experiences.
Addressing the Emergence of PTSD Presumption
John Hanson, Senior Consultant, Willis, Towers, Watson

In the first three months of 2017, state legislatures endorsed 60 occupational presumption bills. The majority of these bills sought to broaden existing occupational presumption coverage to include additional occupations or illnesses or both. Historically, presumption legislation has focused on illnesses with demonstrated connection to first responder occupational risk or exposure. Of the 60 presumption bills in 2017, 10 sought to establish an occupational presumption for PTSD (post traumatic stress disorder), a complex illness to diagnose and treat. Five of those bills passed, igniting a national dialogue on the validity of PTSD as the next generation of presumption legislation. This session addresses both the increase in PTSD legislation and possible avenues for risk pools searching for alternatives to avoid the additional financial stress of PTSD presumption.

Wednesday, October 18
7:30 – 9:15
Pool Administrator Breakfast

9:30 – 10:45
General Session:
The Changing Workforce: Future Talent Trends Impacting Pooling and the Insurance Industry
Margaret Milkint, Managing Partner, The Jacobson Group

Emerging talent challenges, staffing demands, a changing workforce demographic, and a narrowing labor market all highlight the need for new talent solutions. Directly competing with the insurance industry for future talent, public entity pools need to differentiate themselves from the industry to attract and retain top talent. Led by Margaret Resce Milkint, Managing Partner at the Jacobson Group, this session will explore the talent trends, issues and changing dynamics impacting the insurance industry. Gain insights into how the industry is addressing the talent gap and strategies that pools can deploy now to set their organizations apart and ensure they are positioned to recruit and retain top talent.

11:00 AM – 12:15 pm
Recruiting and Retaining Top Talent in Pooling
Laura Honeck, Operations Manager, LMCIT; Margaret Milkint, Managing Partner, the Jacobson Group; Erin Rian, Director of Member Services, NLC Mutual

Public entity pooling offers a rewarding career opportunity hitting on key characteristics attractive to new generations coming into the workforce: it is stable, entrepreneurial, challenging and rewarding, all with a public service approach and member focus. With half of
the workforce set to retire in the next 15 years, new talent strategies and solutions are critical in providing pools with a competitive edge in recruitment and retention of top talent. Building on the preceding general session, take a deeper dive into the talent trends and challenges facing the industry and public entity pooling. Hear from your peers about specific programs and strategies pools have deployed to build a workplace culture attractive to prospective candidates, as well as leadership development opportunities designed to retain top talent in your organization. Bring your ideas, challenges, and successes with you to contribute to the discussion!

**Federal Statutory, Regulatory, & Case Law Update**

*Yucel Ors, Federal Advocacy Program Director, NLC & Lisa Soronen, Executive Director, State & Local Legal Center*

Federal law has a significant effect on local governments and their risk pools. We are now well into a new Presidential administration and have a new Supreme Court Justice. Hear from two leading experts how the latest developments in the federal legislative, regulatory, and judicial environments may affect your pool and its members.

**Risk Member Pool Show & Tell**

This session will highlight new technologies, programs, or services that pools have implemented. Hear a brief overview from each pool sharing something new. Then, attend a mini-session that will provide a deeper dive into the specific program, service, or technology. Attendees will have the chance to rotate among the different pool solutions.

**12:15 – 1:30**

**Lunch and General Session:**

**Preparing for and Responding to Disaster Lessons Learned from North Carolina’s Experience**

*Paul Meyer, Executive Director, and Ken Canning, Associate Executive Director, RMS, North Carolina League of Municipalities*

On March 16, 2017, a massive fire broke out in downtown Raleigh, North Carolina at a building under construction, which severely damaged the adjacent offices of the North Carolina League of Municipalities, disabling its telephone system, and preventing its employees from coming to the office. The League, including its pooling operations, did not miss a beat. Operations continued as usual, with employees working remotely. Come hear how the League managed, despite overwhelming damage to the infrastructure, to continue services to their members largely uninterrupted, and the lessons they learned in the process.

**1:45 – 3:00**

**Keeping Your Pool Relevant in a Rapidly Changing World**

*Sherman G. Chow, Director of Claims, Municipal Insurance Association of B.C.; Jennifer Cohen, Director of Business and Member Development, North Carolina League of Municipalities; David Lodwick, Director of Trust Services, Florida Municipal Insurance Trust*

Pooling has been serving local governments since the insurance crisis of the 1980’s, and in some cases earlier. The value proposition for localities still includes enhanced focus on local government exposures, loyalty to member owners, targeted loss control, and mitigation of the effects of the insurance cycle. However, in a world where
commercial carriers now see local governments as desirable customers, and are rolling out tools and offerings that appeal to them, pools need to "up their game" to ensure that they offer and communicate enhanced value to their members. Join this discussion about the challenges facing pooling in this new world, and how your peers are responding. We will talk about enhancing the value proposition of pooling, using storytelling, looking at pooling through members’ eyes, making your pool the obvious choice, and more.

Strategic Initiatives for Reducing Law Enforcement Liability

Paul Dutra, Esq., Property/Liability Claims Manager, Rhode Island Interlocal Risk Management Trust

This session will provide some practical initiatives designed to foster a culture of risk management within a law enforcement community often facing a skeptical public, judiciary and media.

3:15 – 4:15

“Unconference“ – Topical Discussions Based on Attendee Interests

Do you have any burning topics you want to discuss that aren’t on the agenda? Want to continue a conversation in an informal group? Post your suggestion on the bulletin board by the reservation desk or email Heather Burgess (or any staff member) by Tuesday at 6 pm. We will provide designated casual spaces for these other useful and interesting conversations.

4:15 – 6:00

Closing Fiesta with Mariachi Band

Celebrate a successful conference with us at a closing fiesta on the pool deck. Casual attire welcome and encouraged as we mingle while eating delicious and substantial appetizers, sipping drinks, playing games, and enjoying a mariachi band.