

2017 CSRSM Annual Members Forum



November 6 – 7, 2017

The Mission Inn

3649 Mission Inn Avenue, Riverside, CA 92501

California Schools Joint Powers Authority



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CSRM Annual Members' Forum 2017

Empowering Districts to employ risk-based decision making
at every level and by every employee



08:00 Breakfast Available/ Registration ~Grand Parisian Ballroom

Exhibitor's Hall Open ~Tavern



08:45 Welcome and Opening ~Grand Parisian Ballroom

~Debbie Betts, President, CSRM & Assistant Superintendent, Victor Elementary SD

~Karla Rhay, Ed.D., Chief Executive Officer, CSRM



Keynote Speaker: Crisis Management

Developing, managing, and maintaining focus while leading through district-wide crisis will be the focus of this presentation. Dr. Marsden, Superintendent of San Bernardino City Unified School District, the 9th largest in CA, will share about collaboration efforts, new strategies implemented, and lessons learned from recent crises that will be invaluable for all attendees.

~Dale Marsden, Ed.D., Superintendent, San Bernardino City Unified School District



Campus Vulnerability - What Can You Do?

Due to recent events, considerable attention is now being paid to the vulnerabilities of schools and colleges. School campuses are soft targets; as such, we must continue to identify those vulnerabilities and create a layered approach to safety and security in order to develop true sustainability. Join Michael Perez as he presents the framework necessary to promote safe and more secure campuses.

~Michael Perez, Nicole Miller and Associates



Emergency and Crisis Preparedness & Response

Part of being prepared is assessing the situation to know what you need to be prepared to do. This panel style discussion will consider the various types of emergencies and the critical need for information; either coming in or going out. The panelists will focus on delivering clear and concise information about preparation, resources from the federal government, and will leave you with a greater awareness of what may affect your workplace.

~Dr. Sherry Stone, Emergency Preparedness & Security Manager, Chula Vista Elementary SD

~Frederick Simon, FBI Special Agent, Private Sector Coordinator

~Colin Zarbough, Manager, Security, Privacy & Risk, RSM US, LLP Consulting

~Carrie Cruz, Emergency Svcs Officer, County of San Bernardino Fire, Office of
Emergency Services



12:00 Networking Lunch ~Galleria

13:00 - 13:30 Innovation Built to Equip, Prepare and Respond - Before,

During, and After ~Tavern

You are cordially invited to meet with CSRM's service partners during this 30 minute breakout. You will have the opportunity to hear about solutions in preparing your campus to become better equipped, prepared, and responsive.



Crisis Communication Planning

Crisis communications come alive as we learn how to respond to highly emotional incidents with heavy media involvement. We will dive into crisis response methods from a risk perspective as it pertains to information technology, hitting highlights of what every member should do if they become faced with a data breach or request for ransom.

~Blair Meeks, Jackson-Spaulding

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Lined writing area with 30 horizontal lines.

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Sexual Abuse Prevention

Why are public entities still being besieged by news stories of educator misconduct and child sexual abuse? Sexual abuse prevention is both predictable and preventable when we surround children with knowledgeable and outspoken adults. Learn why schools have such a high prevalence of child sexual abuse and understand how child molesters think and what they need in order to abuse and get away with it. If we all become familiar and informed on best practices for child abuse prevention in schools, we can be empowered to initiate the assessment and continuous improvement process to put a stop to sexual abuse occurring in homes by abusers and on school and college campuses.

~Diane Cranley, Founder, TAALK



Adapting to Marijuana in the Workplace

What does California's legalization of marijuana mean for your workplace? In this session, you will be presented with the concerns that human resource supervisors and directors need to consider. These concerns include: employer practices in light of Proposition 64, reasonable suspicion-based drug testing, disciplining on policy violation, how to deal with employees under the influence of marijuana while on the job, and how to field the latest developments in post-accident drug testing.

~Troy Slaten, Esq., and Robert Dudley, Esq., Floyd, Skeren & Kelley



ADA and the Cyber World

School districts, consortiums, as well as joint powers authorities, are providing more services online. As we "drive more traffic" to our websites, are we discriminating against parents, students, and other website visitors with disabilities and opening the door to litigation under the Americans with Disabilities Act? Ensure that the websites you build meet ADA accessibility requirements to avoid unnecessary litigation to your entity.

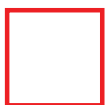
~Christopher A. McIntire, Esq., Cummings, McClorey, Davis, Acho & Associates



Disability Accommodations

Handling non-occupational employee reasonable accommodations can be confusing, leading to questions such as: what are the best practices or how long do you need to offer an accommodation? Through this presentation, we will dig into the importance of good policy and leave with a better understanding of how it plays a role in developing job accommodations for the interactive process, defining undue hardships and the pitfalls to avoid that can result in litigation.

~T. Oliver Yee, Esq., Liebert Cassidy Whitmore



17:00 Closing Remarks & Adjournment

17:30 Social Hour ~The Galleria

I am now ready to

 **Plan**

 **Prepare**

 **Perform**

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Speaker Biographies



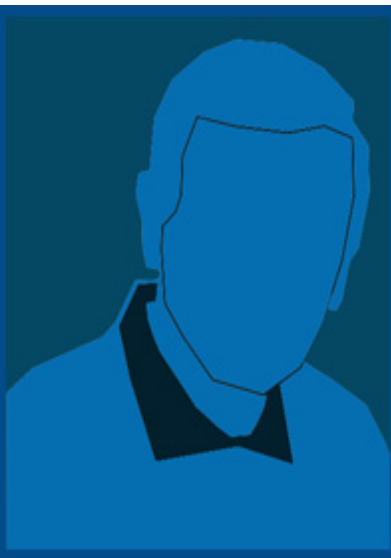
Dale Marsden Dr. Dale Marsden is superintendent of the San Bernardino City Unified School District, California's 9th largest urban public school district serving a diverse population comprised of 73 percent Latino and 14 percent African-American students with a 91 percent poverty rate. The district serves over 50,000 students in 76 schools across a 98 square mile radius.

Dr. Marsden, a 20-year veteran educator has a proven track record of transforming educational systems by focusing on a broad-based community engagement approach that has resulted in historic increases of graduation rates, 50 percent reduction of suspensions and citations, and the creation of robust career pathways that have students elementary through high school developing the skills and certifications necessary to succeed in both college and careers. For 2014-15, SBCUSD achieved an 85% graduation rate, surpassing the county, state and national average.

Under his leadership, the district has become a catalyst to lead the City of San Bernardino beyond bankruptcy to a community of excellence. Much of Dr. Marsden's current efforts are working in tandem with Gallup, Inc. to evaluate community-wide measures of Hope,

Engagement and Well-Being to ensure thriving schools and community.

Dr. Marsden earned his bachelor's degree from California State University San Bernardino in Liberal Studies with a minor in mathematics, and a master's degree in Educational Administration, and a doctorate of education in Educational Leadership, Administration, and Policy from Pepperdine University. He and his wife, Laurie, have been happily married for over 25 years and have four lovely children.



Michael Perez Michael Perez is an experienced security consultant. He spent 8 years with a Special Operations Psychological Warfare unit in the United States Army. After multiple combat deployments, he joined a large Southern California law enforcement agency and quickly became a team leader with their Special Weapons and Tactics (SWAT) Team.

Within this agency, he was tasked with training both law enforcement and civilian personnel in courses varying from basic weapons manipulation to advanced counter assault tactics. With these unique skills, he has effectively trained personnel ranging from business professionals to seasoned SWAT operators.

Assigned to a Department of Homeland Security Fusion Center, Michael also became an authority in risk management and critical infrastructure protection. He has conducted numerous security risk and vulnerability assessments on a broad range of facilities, including schools, government buildings, public utilities, places of worship, and VIP residences. He has further distinguished himself as an expert in active shooter tactics, regularly presenting to both law enforcement and corporate clients. He continues to identify new ways to serve his clients providing them with the mindset and skills usually

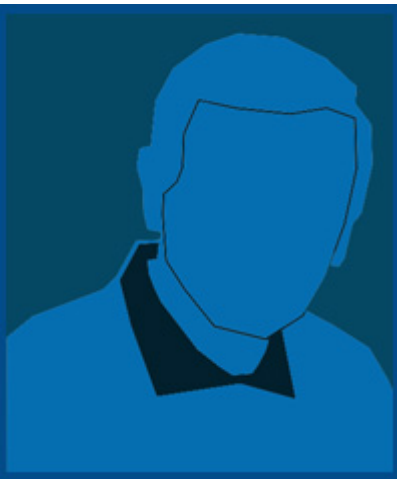
reserved for elite tactical units.

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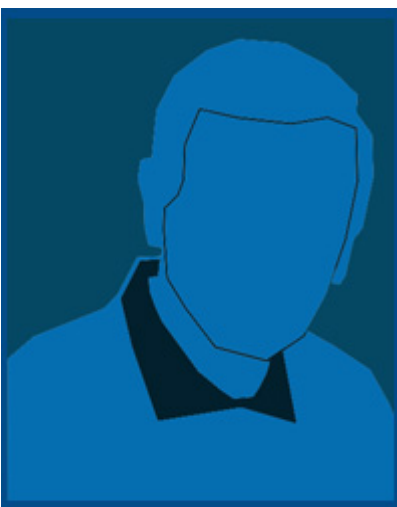


Dr. Sherry Stone Over the last 26 years, Sherry Colgan Stone has worked in the areas of mental health, education and emergency management/homeland security. After eight years of working with Riverside County Department of Mental Health, she became a middle school teacher in Val Verde Unified School District, teaching there for three years. She first became interested in emergency management and homeland security while teaching middle school in Lahore, Pakistan from 1997 – 2000. After returning stateside, she entered into the school safety/mental health arena, working for Riverside Unified School District as a coordinator and interim director for a Safe Schools/Healthy Students Federal Grant program. She then accepted a position at Riverside County Office of Education as a Safe Schools Coordinator. As part of this position, she served as an education liaison to the Riverside County Homeland Security Regional Training Program where she helped developed curriculum for a Homeland Security program at Moreno Valley College. She serves as adjunct faculty in the Homeland Security Program. She spent seven years serving as the Safety and Emergency Planning Manager at Riverside Community College District and

now serves as the Emergency Preparedness and Security Manager for Chula Vista Elementary School District. In her spare time, she serves as a volunteer employee for the Riverside County Sheriff's Department as a member of the Sheriff Emergency Response Team and provides trainings and emergency preparedness consultation services for school districts and community colleges in California.



Frederick J. Simon Frederick J. Simon is an FBI Special Agent/Private Sector Coordinator who has been with the FBI for 19 years. During this time, he has been assigned to a variety of squads where he worked on International and Domestic Terrorism, Espionage, and a variety of violent crimes. Special Agent Simon has also served as an Interrogator at Guantanamo Bay Naval Base, an Evidence Technician for the FBI's Evidence Response Team, and has traveled overseas to represent the FBI abroad. He is currently assigned to the Los Angeles Field Office, Office of Public and Congressional Affairs as a Private Sector Coordinator, and is one of two Special Agents who oversee the LA Region's InfraGard Program.



Carrie Cruz Carrie Cruz joined the San Bernardino County Office of Emergency Services (OES) as an Emergency Services Officer (ESO) in 2011 with 15 years of emergency management experience and a talent for writing plans. Current projects include writing the Emergency Operations Plan, EOC Standard Operating Procedures, Duty Officer Handbook, and an innovative project outlining the steps of the Disaster Cost Recovery process into a Standard Operating Guideline (SOG). Additionally, she serves as the County's WebEOC Program Administrator, an OES CERT Instructor, and as a member of the team of Emergency Services Officers been involved in several EOC activations.

She is the lead planner for the Responders Organized for Pass Emergencies (ROPE) Filed Operations Guide (FOG), a four year planning project to support the strategy and tactics of the firefight effort in the Cajon Pass. The ROPE FOG received national and state recognition and was awarded the 2014 Achievement Award from the National Association of Counties (NACO) and the 2014 Gold Emergency Management Award from the California Emergency Services Association (CESA) for its innovation and exceptional effort in the field of emergency preparedness.

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Colin Zarbough As a manager in RSM's West Region security, privacy and risk group, Colin is responsible for supervising network vulnerability scanning, penetration testing, forensic data collection and wireless penetration testing. He has numerous years of experience in risk management, security implementation project management, internal audit, IT General Controls—Security, Log Management, SIEM implementation, forensic investigation, web application testing, HIPAA/HITECH, PCI, and external and internal penetration testing. Colin has extensive experience working in all manner of security environments, ranging from growing small businesses to large government agencies.

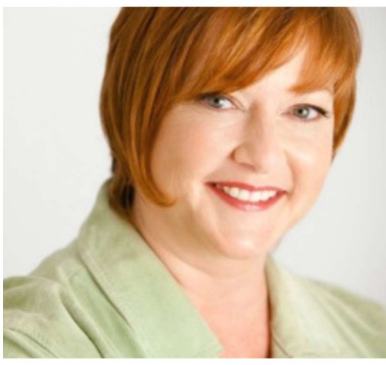
With a strong background in information security, Colin is able to understand and explain the risk of both internal and external malicious actors, as well as the risks consistent with the ever-changing security landscape. He has extensive experience leading security implementations and training for a host of industries which span aviation, finance, government, medical, consumer goods and industrial products. He has a keen understanding for the need of both professionalism and discretion when working in

sensitive security environments.

Professional affiliations and credentials include: Information Systems Audit and Control Association (ISACA), Infragard, Certified Ethical Hacker (CEH), Health Information Security and Privacy Practitioner ISC2 (HCISPP), PCI Qualified Security Assessor (QSA), and Certified Information Systems Auditor (CISA). He received his Bachelor of Science, Business and Information Technology, from the University of Baltimore.



Blair Meeks Blair Meeks is a communication strategist and coach at Jackson Spalding where he has worked for more than eight years. Before working with Jackson Spalding, he spent 20 years as a television news reporter working at stations across the country and winning six Emmy awards in the process. He now specializes in crisis communication where he helps organizations in the midst of a challenge, manage communication so that reputations are protected and sometimes even improved as a result.



Diane Cranley Diane Cranley is the author of *8 Ways to Create their Fate: Protecting the Sexual Innocence of Children in Youth-Serving Organizations* and a child sexual abuse prevention consultant. Diane guides school district leaders to create an environment where child molesters virtually cannot succeed without being caught and therefore won't want to work.

She is also the Founder and President of TAALK (Talk About Abuse to Liberate Kids), a federally approved, nonprofit agency dedicated to breaking the silence that surrounds child sexual abuse. Diane is working with insurers, risk pools, county departments of education, and school districts to create a brighter and safer tomorrow for our children.

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Troy W. Slaten, Esq. Troy Slaten is a partner with the Law Offices of Floyd, Skeren, & Kelly, LLP. He is the managing attorney of the firm's criminal defense practice. Mr. Slaten earned his Bachelor's Degree, with honors, from The University of California, Los Angeles (UCLA). He went on to earn his Juris Doctorate at Pepperdine University School of Law. While in law school, Mr. Slaten actively participated on the honors Trial Team winning awards.

Mr. Slaten began his legal career working for the Los Angeles County District Attorney's office. At the DA's office, he was involved in the prosecution of various felonies and misdemeanors ranging from complex fraud cases to drug, theft, and sex cases.

Mr. Slaten is certified to administer and evaluate Field Sobriety Tests (FSTs) by the International Association of Chiefs of Police (IACP) and the National Highway Transportation Safety Administration (NHTSA). He is certified on the Alcosensor Preliminary Alcohol Screening (PAS) device commonly used in DUI investigations. He regularly attends seminars and lectures on criminal defense and DUI defense. He is a member of the National Association of Criminal Defense Attorneys, National College of DUI

Defense, California DUI Lawyers Association, California Attorneys for Criminal Justice, Criminal Courts Bar Association, Beverly Hills Bar Association, Los Angeles Bar Association, and the American Bar Association. Mr. Slaten is licensed to practice law in all the courts of The State of California, as well as in The District of Columbia.



Robert A. Dudley Robert Dudley is an associate attorney with the firm's Beverly Hills office where he is a member of the criminal law department. Mr. Dudley holds a Juris Doctor (cum laude) degree from Pepperdine University School of Law where he was awarded the Order of Barristers. He also holds a Masters of Public Policy degree (emphasis in economics) from Pepperdine's School of Public Policy and a Bachelor of Arts degree from Washington University in St. Louis (dual majors: economics and Spanish). During law school, Mr. Dudley was a member of two national championship moot court teams that took top honors at the Chicago Bar Association and the University of North Carolina School of Law moot court competitions. Mr. Dudley completed an externship with the Honorable Anthony J. Mohr in the Complex Litigation Division of the Los Angeles County Superior Court where he worked on a variety of complex civil matters involving corporate, insurance, and employment law. Prior to joining Floyd, Skeren & Kelly, Mr. Dudley was a law clerk at the Law Office of Joel Koury where he assisted with the defense of a capital murder case in addition to DUI, federal RICO, and drug trafficking cases. While completing his joint law and public policy studies, Mr. Dudley also performed legal and policy research on juvenile sentencing for Human

Rights Watch in Los Angeles. He is fluent in Spanish (written and verbal).

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Chris McIntire Chris McIntire is a litigation attorney in CMDA's Riverside office, where he practices public entity defense, employment law, premise liability and mass tort defense. As an attorney, Chris has represented public entities in a wide range of disputes, from mass flooding and fire cases, to wrongful death, breach of contract, trip-and-falls and accidents involving traumatic brain injury. He has also represented public entities in employment law, civil rights and police misconduct.

Before becoming a lawyer, Chris served for 23 years in the U.S. Navy, rising through the enlisted ranks from E-2 to E-8, before he retired. He began his military career as a military broadcast and print journalist and eventually became a public affairs and marketing professional.

Chris graduated with a Bachelors of Science from Excelsior College in 2002. He graduated from Loyola Law School Los Angeles in 2007. He is admitted to practice before the California Supreme Court, the United States District Court – Central District California and the United States Court of Appeals for the 9th Circuit. Chris has published articles and spoke on legal issues before his peers and the public and has provided training for public entities and private companies.



T. Oliver Yee T. Oliver Yee provides representation and legal counsel to Liebert Cassidy Whitmore's city, county, special district, school and community college district, and independent school clients.

His practice involves representing and advising clients on a variety of employment topics including the Fair Labor Standards Act, laws and regulations of public employee retirement plans, disciplinary actions, unfair labor practices, and grievances.

Oliver has also successfully represented clients in class action and single plaintiff litigation matters in both state and federal court from inception through discovery, pre-trial proceedings, and settlement or trial.

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California Schools Employee Benefits Association is among the top five largest school joint powers authorities in California. We meet the needs of member districts by maintaining stable rates, innovative products, programs and services that enhance your members' benefit offerings. Our creative and comprehensive benefit choices include quality medical, dental, vision, life insurance, plus an unmatched menu of additional options all within your grasp.

The ability to choose really matters. At CSEBA we'll find the right fit for your district. Contact us today for a quote. For more information visit www.cseba.org or call (909) 763-4900.



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Exhibitors



Raptor is the Nation's leading provider of integrated school safety technologies. The Raptor System can help your school screen out registered sex offenders, manage custody issues, coordinate volunteers, and respond to emergencies. Over 18,000 campuses across the United States trust Raptor to keep their students safe.



Celebrating 33 years of serving the needs of homes, businesses, schools, and governments, Simpler Life provides emergency preparedness kits to you be prepared for any crisis. Simpler Life offers specialty kits tailored for teachers, school administrators, bus drivers, campus supervisors, and for specific emergency situations

such as lockdowns, earthquakes, active shooters and rescues.



The future is here for school transportation and other school departments having real-time access to combined GS school bus locations and, more importantly, the accurate real-time ID accountability of all students' onboard district buses or any other district surroundings or events where accurate student identification is required. It provides school district administrators with a secure and encrypted student ID system that is used to provide parents with peace of mind knowing that their children have been identified and verified safe.



InfraGard: InfraGard provides its members with unmatched opportunities to promote and enhance their organization's physical and cyber security through access to a trusted, national network of Subject Matter Experts from the public and private sectors. InfraGard is an organization sharing information and intelligence and integrating assets with local, state, and federal resources for the protection of our nation's critical infrastructure.



Bridg-It partners with schools to address bullying and harassment issues with comprehensive and compliant solutions that cultivate safe, positive environments. Bridge-it school allows students, parents, and staff to report incidents instantly and discreetly, offering students a safe way to support classmates without having to step into a conflict. The result is better communication and a safer community.



Making Right Choices (MRC) is your risk management partner in prevention. MRC partners with educational institutions to help them promote a healthy learning environment for students and those who serve them. Through organization-wide training, and face-to-face consultation, MRC fosters coordinated communication

among stakeholder groups to deepen their understanding of boundary violations, the value of risk prevention, resilience, and healthy interactions.

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For thirty years, Beazley has been refining an approach to the design of insurance that aims to give clients the maximum benefit with the minimum of hassle. Beazley aims to offer their clients a level of expertise and responsive service that is not always easy to find, and their experienced underwriters can make rapid decisions leading to straight answers and first class service.



Community Matters is recognized as an innovative and thought-leading organization committed to improving the social-emotional climate of our nation's schools and communities. Over the past two decades, Community Matters has worked with more than 1,000 schools and organizations across the U.S. to equip youth with the knowledge, tools, and support to create safer, higher performing, thriving schools.



Blanchard Institute is the premier and preferred thought-leader, resource provider, and aggregator in leadership development, character building, and life skills coaching supported by resiliency research. Ken and Margie Blanchard's leadership philosophy and principles have been embraced by corporate America's leaders for more than 35 years. Now, they have made their programs available through a public non-profit organization to serve youth as well as leaders in the education and non-profit business markets around the world.



Fire. Smoke. Flood. Mold. When damage occurs to your school, Padgett's is here to help. A full service cleaning and restoration company, we understand what you are going through and will help you return to normal operations quickly. By maintaining our commitment to family values and honesty, our goal is your trust. We won't let you

down.



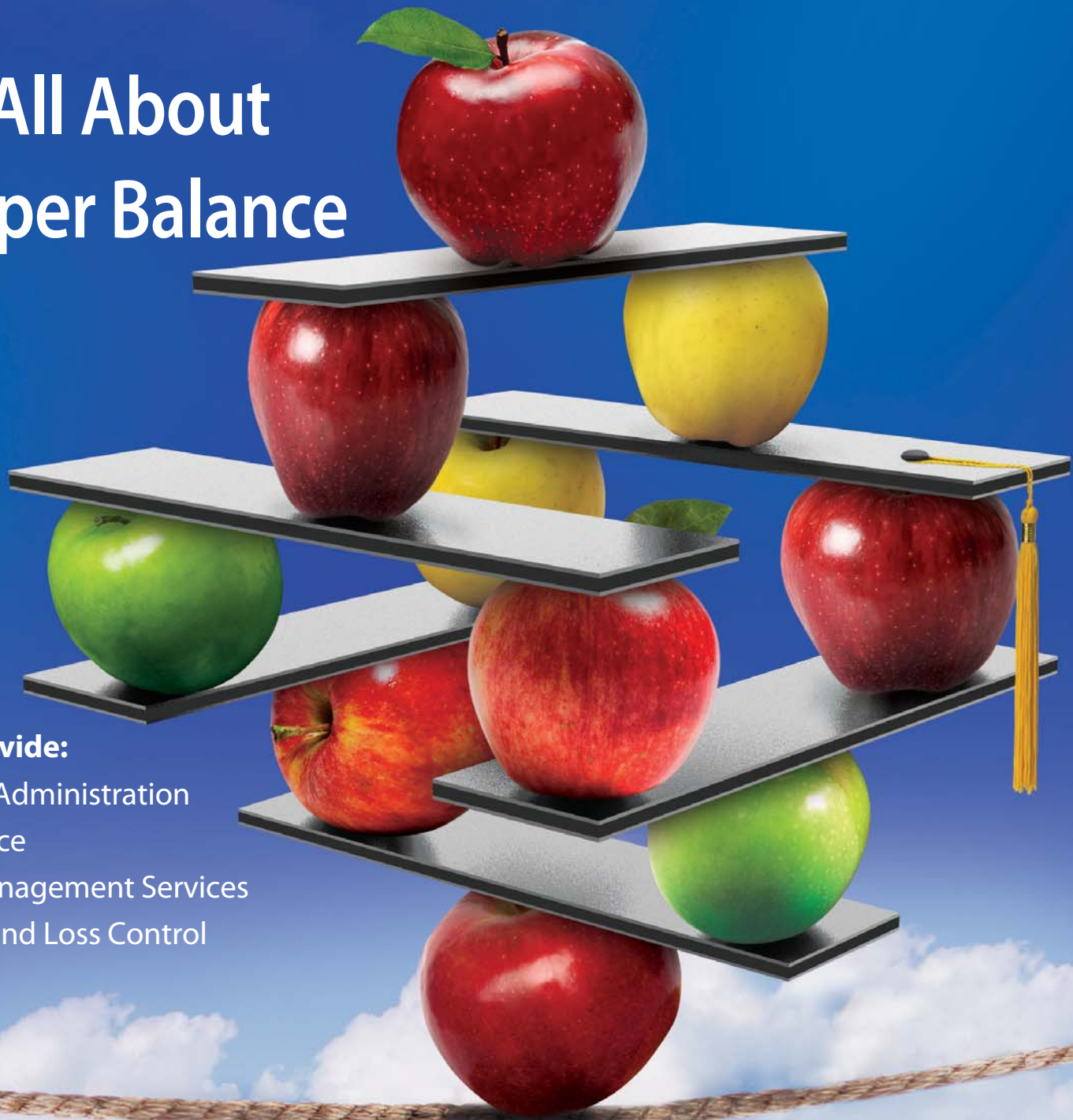
The Riddell InSite Impact Response System is a helmet-based impact monitoring technology designed to alert when significant single or multiple impacts are sustained during a football game or practice. Riddell InSite was built on a foundation of research from 2+ million impacts recorded since 2003.



Remind is a platform providing meaningful communication for every student, teacher, and parent. It allows real-time messaging for your school, a specific group, or just a single person.

Risk or Reward...

It's All About Proper Balance



We provide:

Claims Administration
Insurance
Risk Management Services
Safety and Loss Control

Manage Your District Risk with the Right Combination of Services from California Schools Risk Management

Through pooled, personalized risk management, our not-for-profit JPA can help you focus precious education dollars in the classroom where they matter most. And that, is good, balanced business. Call to join our pool at **(909) 763-4900** or for more information, visit our website at **www.csrmjpa.org**.



CSRM

California Schools
Risk Management

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CSRM Board Orientation

November 7, 2017

- 07:00 Breakfast Available/Registration**
- 08:00 Welcome & Opening**
- Purpose and Rewards of Member Engagement**
~Debbie Betts, CSRM President & Asst. Superintendent, Victor Elementary SD
- Board Member Guidelines**
~Robert Feldhake, Esq., The Feldhake Law Firm
- Red Light, Green Light, What can we do? Board Governing Documents Review**
~Eric Dahlen, ARM, Risk Officer, CSRM
- Contract Review & Certificates of Insurance**
~John Chino, ARM, AJ Gallagher & Co
- JPA Member Role in Creating a Safety Culture for your Organization: Member Services Resource Booklet**
~Robert Romero, ARM, Safety/Loss Control Manager, CSRM
- Risk-based Decision Making**
~Marco Guardi, AJ Gallagher & Co
- Trailblazing Districts - Recognition and Showcase**
- 10:55 Closing/Boxed Lunch Available**
- 11:00 Board of Directors Meeting to Immediately Follow**

I am now ready to



Plan



Prepare



Perform

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Lined writing area for notes.

We're Here for You



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