



# PRISM

Public Risk Innovation,  
Solutions, and Management

# QUICK START GUIDE

*Your Guide to Easy and Successful Implementation of  
PRISM's Services and Partner Programs*

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[www.prismrisk.gov](http://www.prismrisk.gov)



# ABOUT THE GUIDE

**These Quick Start Guides were created to assist with easily and effectively rolling out services within our PRISM members' agencies.**

## **Why the focus on ease of use?**

Because engaged employees have the knowledge, skills, ability, and willingness to manage their safety and to act on employer's recommendations. Members that invest in safety and employee engagement can expect returns in the form of lower claims, higher morale, and improved bottom-line costs.

But the barriers are real, too: reluctant users, end-user questions, cumbersome enrollment, and puzzling interfaces. And that's why we created The Guide.

## **How to use The Guide?**

In this guide, we describe how you can make the services work for you and your agency. Find out more about the benefits, services, products, and features of each one. Step-by-step instructions make it easy to started.

## **Eligibility**

PRISM members who participate in a Major Program either directly, or via their parent Joint Powers Authority (JPA), may access the services contained in The Guide. Check out the [PRISM's Menu of Services](#) matrix for more information.

If you have any questions, please feel free to [contact us](#). Ready! Set! Break!



Risk Control



Risk Management



Claims



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- CPR, First Aid, AED (Health and Safety Institute)
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- Catastrophic Claims Management (Paradigm)
- Injury Reporting & Triage (Company Nurse)
- Investigative Services (iUnited)
- Managed Care Consulting (Donn & Co)
- Medical Transportation & Language Services (ProCare)
- Medicare Reporting Services (ExamWorks)
- Rehabilitation Care (NeuroRestorative)
- Return-to-Work (NPA)
- Structured Settlements (Ringler)

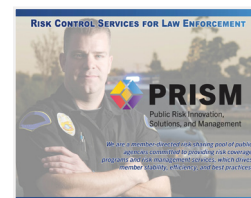
### Risk Management

- Crisis Incident Management and Communication (Mainstream Unlimited)
- Legal Advice Services (Steve Underwood)
- PRISM Employment Practices Legal Advice Services (PRISM)
- Strategic Planning Facilitation (PRISM)

## PRISM Staff Services

We invite you to [contact us](#) for any of the below service offerings:

- [Direct Consultation](#)
- [Policy Review](#)
- [On-Site Inspections](#)



# ACTIVE VIOLENCE EMERGENCY RESPONSE TRAINING (AVERT)

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To get started, please contact:  
Tim Cross, Channel Partner Specialist  
[tcross@hsi.com](mailto:tcross@hsi.com) | 509.412.7062

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with the Health & Safety Institute (HSI) to provide members access to AVERT. AVERT goes beyond active shooter training and uses dynamic methods to teach employees proactive awareness, how to react and protect themselves and others in a violent situation, and how to respond to severe injuries that are often a result of these occurrences.

## Benefits Include

- Training to build confidence
- Blended training format
- Hands-on training to reinforce life-skills combined with flexibility and responsiveness of local instructors



### Confidence

Give employees the confidence they need to respond if active violence or a life-threatening situation occurs. Being able to react to these situations quickly and with confidence is vital to saving lives.



### Flexibility

Instructors train to build confidence, using a blended training format with hands-on training to reinforce life-skills.



### Discounted Pricing

Prices have been negotiated with your public entity's needs in mind.



## Quick Start Steps

1. Visit <https://goto.hsi.com/prism> to complete the information request, and a representative from HSI will contact you.
2. Set up an "Open P.O." agreement regarding billing (can include a not-to-exceed amount) when you're ready to move forward.
3. The client's main point of contact will provide HSI dates, times, and locations, and a list of participants for the training.
4. HSI scheduling team will work with the client and our instructor base to set up the class.
5. Blended AVERT links will be sent out to each participant.
6. In-person AVERT class takes place.
7. Employees will receive digital certificates via email.

# BACKGROUND CHECK SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

Ensure prospective employees will not pose a risk to others by using one of the four comprehensive background check packages.

Plexus Global conducts background checks and ensures compliance with requirements for safeguarding the confidentiality of information obtained.

## Services Include

- Criminal and Civil Record Searches
- Professional licensing/certification/education verification
- Credit Check



To get started, please contact:  
Plexus Global Info Line  
info@plexusglobalinc.com | 844.516.1008



**Intuitive Web-Based**  
Member Platform  
Simplified applicant  
screening process.



**Quality Control & Compliance**  
FCRA and California  
specific compliant  
reporting.



**Discounted Pricing**  
Packages have been  
specifically designed  
for unique public entity  
needs.

## Quick Start Steps

1. Discuss and finalize with Plexus Global the services your agency will require.
2. Complete and sign the Master Service Agreement with Plexus Global.
3. Each individual user who will access the consumer reports must sign and return the End User Access Security Agreement & Acknowledgment of FCRA Compliance Requirements.
4. An independent third party will complete an on-site inspection. This is required since Plexus Global manages sensitive information.
5. Finalize your agency's account set up, which includes web-based training for all PlexOne platform users who will be accessing applicant reports.

# CHECKPOINT SYSTEM SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

# GUARD1

by TimeKeeping Systems

To get started, please contact:  
Stephanie Barsella, Western Regional Manager  
sbarsella@guard1.com | 216.595.1105

PRISM has partnered with TimeKeeping Systems to provide discounted rates for Guard1, a comprehensive automated check-in system.

A guard tour system aids in loss prevention and provides members with defensible documentation in the event of a lawsuit or investigation.

## Services Include

- Complimentary Point Upgrades for the life of the purchased support subscription.
- Variety of wireless styles and mounting options for touch memory button checkpoints.
- Securely transfer information from the rugged data collection device in seconds.



### Safety Inspections

Provide proof of presence and confirm that inspections have been made in your government buildings, hospitals, and jails.



### Record Multiple Activities

Document a variety of activities, such as well-being checks, inmate demeanor, or meal and medication distribution.



### Discounted Pricing

Packages have been specifically designed for unique public entity needs.

## Quick Start Steps

1. Contact Guard1 to receive an overview of system features, you can request an on-site meeting or a demonstration via WebEx teleconference.
2. The Guard1 representative will discuss service and equipment options, as well as develop a customized package.
3. Guard1 will provide a kick-off meeting to discuss responsibilities and system requirements.
4. On-site installation assistance or WebEx based installation and training are provided based on the equipment and services selected.
5. Final software and database configuration.
6. Initial end-user training provided on-site or via WebEx.

# CERTIFICATE OF INSURANCE MANAGEMENT SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with Evident to provide automated Certificate of Insurance Management services to help members manage and mitigate third party risk.

## Services Include

1. Automated Insurance Verification
2. Managed Service Options
3. Implementation
4. Insurance Requirements Extraction

Please note: Services provided by Certified Risk Managers/Bob Marshburn are not included.



To get started, please contact:  
Bryan Cogliano - Director of Insurance  
[bcogliano@evidentid.com](mailto:bcogliano@evidentid.com) | 949.432.1986



**Leading Automation**  
Unlimited Flexibility and  
24 hour turnaround times



**Deep Verifications**  
Go beyond policies and  
limits to truly mitigate risk



**Discounted Pricing**  
PRISM members benefit  
from discounted, pre-  
negotiated pricing

## Quick Start Steps

1. Contact [Bryan Cogliano](#) or [fill out this form](#) to receive a demo and overview of system features.
2. Bryan will discuss platform options, as well as develop a customized package to fit your needs.
3. Bryan will provide a kick-off meeting to discuss responsibilities and system requirements.

## 4-Week Onboarding Plan

Week 1: Kickoff meeting; finalize decision criteria, email templates, and cadence; receive data sheet.

Week 2: Review portal settings; conduct training; begin importing third party insureds.

Week 3: First review meeting; adjust email content, cadence, or Coverage Criteria Groups.

Week 4: Follow-up training; conduct second review meeting; implement final changes.

# CPR, FIRST AID & AED ONSITE TRAINING



To get started, please contact:  
Tim Cross, Channel Partner Specialist  
[tcross@hsi.com](mailto:tcross@hsi.com) | 509.412.7062

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with the Health & Safety Institute (HSI) to provide members access to an entire training network of qualified instructors who bring engaging and cost-effective classes to you and your employees.

## Benefits Include

- Single point of contact, centralizing your scheduling and total program management
- Dynamic and engaging first aid, CPR, and AED training that conforms with current AHA and ARC guidelines
- Quality, consistency, and accountability, combined with flexibility and responsiveness of local instructors



### Consistency

Regardless of location, you can trust that your employees receive a consistent training message.



### Experience

Instructors are highly experienced, qualified, verified, and required to adhere to effective quality assurance standards.



### Discounted Pricing

Prices have been negotiated with your public entity's needs in mind.

## Quick Start Steps

1. Visit: <https://goto.hsi.com/prism> to complete the information request and a representative from HSI will contact you.
2. Set up an "Open P.O." agreement regarding billing (can include a not-to-exceed amount).
3. You are now able to schedule classes. There is a maximum of 12 students per class and the course is 6 hours long. You will need to provide a credit card to secure a course date (your account will not be charged until the course is completed).
4. Members must provide the training facility with the following:
  - space large enough to accommodate class size
  - adequate seating, light, temperature, and floor space for skill practice sessions
  - an operational DVD player and a color television or monitor
5. HSI will provide the training materials and equipment.

# REMOTE SKILLS VERIFICATION (RSV) CPR, FIRST AID & AED TRAINING

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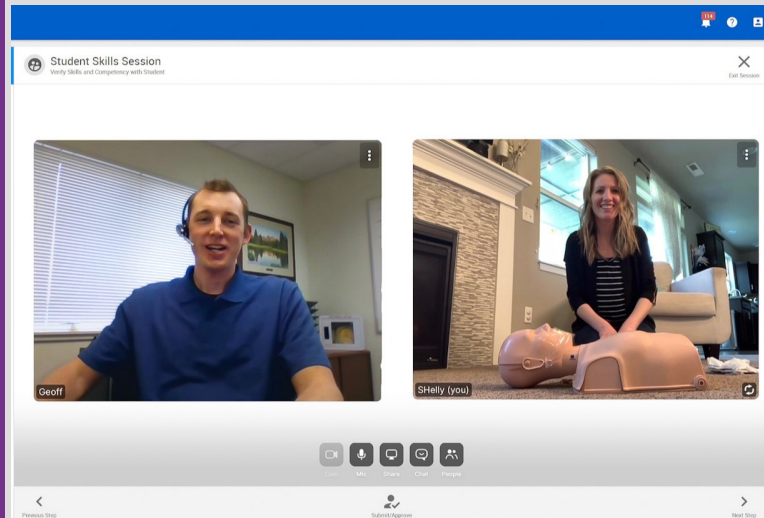
To get started, please contact:  
Tim Cross, Channel Partner Specialist  
[tcross@hsi.com](mailto:tcross@hsi.com) | 509.412.7062

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with the Health & Safety Institute (HSI) to provide members access to Remote Skills Verification (RSV) for CPR, First Aid & AED Certification.

## RSV Benefits Include

- Incorporates hands-on remote skills verification with blended training options to meet certification requirements
- Allows employees to stay up to date with certification from the comfort of their home or office
- Single point of contact, centralizing your scheduling and total program management
- Dynamic and engaging first aid, CPR, and AED training that conforms with current AHA and ARC guidelines



### Consistency

Regardless of location, you can trust that your employees receive a consistent training message.



### Experience

Instructors are highly experienced, qualified, verified, and required to adhere to effective quality assurance standards.



### Discounted Pricing

Prices have been negotiated with your public entity's needs in mind.

## Quick Start Steps

1. Determine how many employees need training
    - a. To directly purchase individual RSV classes contact [riskcontrol@prismrisk.gov](mailto:riskcontrol@prismrisk.gov) for instructions.
    - b. To purchase multiple seats in an RSV class, please visit <https://goto.hsi.com/prism> to complete the information request, and a representative from HSI will contact you.
  2. Set up an "Open P.O." agreement regarding billing (can include a not-to-exceed amount).
  3. Provide HSI with the main point of contact/administrator's contact info.
  4. A self-enrollment email will be sent out to the main POC/admin to share with the employees that should enroll.
  5. Each enrolled employee fills out a very short form using the link the admin provided.
  6. Enrolled employees will be given access to a CPR/FA blended course, a scheduling tool, and the RSV Session. Members will have a loaner manikin\* shipped directly to employees, along with any necessary FA training supplies.
  7. Upon passing the blended course & demonstrating proficiency during RSV, employees will receive a digital certification card.
  8. RSV sessions will be made up of 1-3 students (from your organization or others).
- \* This manikin is made to be used once and returned to HSI for sanitation.

# DRUG & ALCOHOL TESTING SERVICES

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Driving Technology. Delivering Service.

To get started, please contact:

John Acosta, Client Support Specialist

[jacosta@plexusglobalinc.com](mailto:jacosta@plexusglobalinc.com) | 951.383.4122

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with Plexus Global to deliver drug and alcohol testing services for our members.

## Services Include

- Random Driver Selection
- Medical Review Officer (MRO) Coordination
- Test Types available:
  - Post-Accident,
  - Reasonable Suspicion, and
  - Applicant Screening
- FMCSA Clearinghouse Queries
- Program Management



### Confidential Electronic Results

Test results will be available to view within 24 to 72 hours on PlexOne.



### PRISM Consortium

The Consortium option can be a way to help reduce costs by placing your drivers into a larger testing pool.



### Discounted Pricing

Prices have been negotiated with your public entity's needs in mind.

## Quick Start Steps

1. Speak with Plexus Global and complete and sign the Master Service Agreement and submit to [randoms@plexusglobalinc.com](mailto:randoms@plexusglobalinc.com).
2. Plexus will work with the Designated Employer Representative (DER) to establish:
  - a. Who will be able to work with Plexus to submit and receive results and Reports.
  - b. Which pool type your organization will participate in (PRISM Consortium or Stand-Alone).
  - c. If a non-DOT program also be established.
  - d. Where your program stands to date so a plan can be created to meet DOT annual requirements.
  - e. The collection sites that best meet your organization's needs.
3. Prepare an [Excel document](#) of all employees who will be participating in the Random Testing Program.
4. Read the [PRISM Drug and Alcohol Testing Program Policy](#) and sign the [Policy Acknowledgment](#) statement. The statement should be sent to [PRISM Risk Control](#).
5. Complete the Designated Employer Representative Training course on PRISMtv.





To get started, please contact:  
Alec Henderson, Director of Business Development  
[alec.henderson@benchmarkanalytics.com](mailto:alec.henderson@benchmarkanalytics.com)  
469.933.9366



# EARLY INTERVENTION SYSTEM (EIS)

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM selected Benchmark Analytics® to offer our members the Benchmark Blueprint - an evidence-based software solution that automates personnel management and enables accurate early intervention.

The Benchmark Blueprint uniquely provides real-time analytics allowing command staff to proactively identify agency and officer level risk patterns before adverse events happen — paired with the industry's first research-based technology to recommend and track support strategies that change officer behavior as well as facilitate custom wellness planning to improve health and well-being. Benchmark's Blueprint automates and centralizes agency operations while enabling command staff to elevate performance, trust, and transparency.



### What is it?

A PRISM partnership offering members discounted access to Benchmark's evidence-based solution for police force management and early intervention.



### Who can participate?

Any PRISM member that has a law enforcement agency, including participating individual entity members, risk pools and all of the pool's members, and any PRISM participant outside of California.



### Discounted Pricing

Prices have been negotiated with your public entity's needs in mind.

### How does it work?

- 1 Through a special Benchmark offering for PRISM, agency members can deploy the Benchmark Blueprint to automate all their officer management processes with evidence-based risk analytics — to improve overall agency-level and officer-level performance.
- 2 PRISM negotiated a standard license agreement and discounted price for any member who wishes to deploy the Benchmark Blueprint. Member agencies implementing the solution need only fill out a Work Order after securing necessary approval to access Benchmark's services.
- 3 PRISM members work directly with Benchmark to configure and deploy the Blueprint for agency operations. Participating members get ongoing access to the Benchmark Blueprint's latest evidence-based research and system upgrades at no additional cost.

# EMPLOYEE PERFORMANCE EVALUATION SOFTWARE

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*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with Vector Solutions to bring our members Vector Evaluations+, an Employee Performance Evaluation Software designed specifically for first responders.

Tracking your crews' abilities is essential for ensuring effective job performance. With this software, all your performance evaluation needs are met in one powerful tool. Vector Evaluations+ delivers an all-in-one solution for law enforcement FTO.

## Services Include

- Test and track skill competencies
- Oversee officers' progress during FTO program
- Record videos of skill demonstrations
- Assess performance
- Integrates with Vector Solutions' training platform

To get started, please contact:  
Kegan Konrady, Regional Sales Manager  
[Kegan.Konrady@vectorsolutions.com](mailto:Kegan.Konrady@vectorsolutions.com) | 858.376.1634



### Customizable

Access a library of pre-built skill sheets or create your own.



### Mobile Ready

Works with any smart device to allow for assessments in the field.



### Discounted Pricing

Prices have been negotiated with your agencies' needs in mind.

## Quick Start Steps

1. Contact [Kegan Konrady](#) for a demo or to answer any of your questions.
2. Discount pricing is based on the number of users in your agency.
3. Administrators will be given one-on-one training to ensure a successful launch.



# EMPLOYER PULL NOTICE (EPN) PROGRAM

*PRISM partners with the industry's best to provide services that are second to none.*

To get started, please contact:  
John Acosta, Client Support Specialist  
[jacosta@plexusglobalinc.com](mailto:jacosta@plexusglobalinc.com) | 951.383.4122



Plexus Global has partnered with Embark Safety, a DMV approved EPN agent, so members can monitor employee driving records efficiently and securely.

Promote driver safety by receiving automated reports and email notifications.

## Benefits Include

- Ability to manage drivers electronically.
- Assist agencies with California Vehicle Code compliance.
- Reduce administrative costs for your organization.



### Reports

Management reports available to help you quickly identify expirations and other risk-related driving activity.



### Monitoring

Receive an electronic pull notice alert automatically, easing your administrative efforts.



### Value Added Benefit

Access this service at no extra cost as a value-added benefit of your membership with PRISM.

## Quick Start Steps

1. Determine if your agency already has an EPN Agent and/or a DMV requester code (information for your new account must match existing records with the DMV).
2. If you wish to enroll all employees, DMV Form INF 1101 Authorization for Release of Driver Record Information must be completed by each non-mandated driver.
3. Visit <https://www.embarksafety.com/plexus/> using the password: "prism" to enter. Here you will find implementation instructions directing you to complete the Terms of Service and INF 2110 - Agent Authorization Form.
4. If you have a current EPN Agent, you will need to formally terminate the service. This letter should be on company letterhead, dated, and signed. The current agent must acknowledge receipt of this letter with the DMV before they will assign your agency to a new agent.
5. Plexus will set up user accounts, ensure drivers have been added correctly, and provide system training for the Embark Safety Connect Platform.

# EQUIPMENT & APPARATUS INSPECTION SOFTWARE

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*PRISM partners with the industry's best to provide services that are second to none.*

To get started, please contact:  
Steve Walsh, TS Inside Sales Representative  
[steve.walsh@vectorsolutions.com](mailto:steve.walsh@vectorsolutions.com) | 858.683.7745

Vector Check It simplifies how first responder agencies track inspections. Streamline routine checks for equipment, vehicles and apparatus including the ability to: open service tickets, document, and track the progress of an out-of-service apparatus. This allows your agency to ensure resources are current, in compliance, and functioning properly.

## Services Include

- Access to customizable checklists which can be created based on your needs
- Push notifications to alert users of past-due checks, like an overdue oil change or necessary repair
- Reports with automatically generated graphs and figures that make it easy to track your apparatus



### Mobile

Conduct inspections with this powerful application built for iOS or Android devices.



### Integrated

Access your checks through the same Vector Solutions LMS platform you use for training.



### Discounted Pricing

Prices have been negotiated with your fire and EMS agencies' needs in mind.

## Quick Start Steps

1. Check out <https://www.vectorsolutions.com/solutions/vector-check-it/> and watch the introduction video to learn more.
2. Contact [Steve Walsh](#), for a demo of the software and mobile application. He will request information regarding your apparatus and trucks in order to provide you with a quote that includes the special PRISM discounted rate.
3. Administrator training is available through one-on-one training sessions set up directly with your account manager.
4. Vector Solutions will help at any step of the way in the implementation process, including helping you build customized checklists based on your needs.

# FIRST RESPONDER PEER SUPPORT SERVICES

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*PRISM partners with the industry's best to provide services that are second to none.*

To get started, please contact:

TCTI Team Members

[prism@thecounselingteam.com](mailto:prism@thecounselingteam.com) | 800.222.9691

PRISM has partnered with The Counseling Team International (TCTI) to provide discounted rates for their expansive range of First Responder Peer Support services. This partnership offers access to TCTI's team of professionals and network of culturally competent clinicians who know how to treat sensitive issues with trust and confidentiality. TCTI is committed to integrating both proactive and reactive wellness solutions to support the ever-changing needs of individuals and departments that they serve.

## Services Include

- Program implementation assistance
- Existing policy and program review
- Assistance in selecting peer support team members
- Wide variety of training and retreat topics for all employees, including members of the peer support team
- Ongoing program consultation and support
- Crisis incident management assistance



### Experience

TCTI has nearly 40 years of experience working with First Responder agencies across the Country.



### A-La-Carte

No service bundles or requirements, pick any or all of the offered services that your agency needs.



### Discounted Pricing

Prices have been negotiated with your public entity's needs in mind.

## Quick Start Steps

1. The First Responder Agency sends an email to [prism@thecounselingteam.com](mailto:prism@thecounselingteam.com) or calls 800.222.9691 to set up an introductory meeting with The Counseling Team to discuss their service offerings.
2. TCTI staff will collaborate with you to answer questions and establish the specific services that you would like to set up and that best fits your needs.
3. A contract will be created that reflects the services that your agency has decided to utilize and a start date for services to begin.
4. After the contract is signed, TCTI will support your agency and provide services as agreed.
5. If your agency has an EAP or is a member of the PRISM Concern/ConcernPlus programs then some TCTI services may be duplicative. Be sure to check current coverages to avoid overlap. If you need assistance, please reach out to Tani Corona - 916.850.7300 or [tc corona@prismrisk.gov](mailto:tc corona@prismrisk.gov)

# LEARNING MANAGEMENT SYSTEM

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To get started, please contact:  
Christian Kelly, Customer Success Manager  
[christian.kelly@vectorsolutions.com](mailto:christian.kelly@vectorsolutions.com)  
813.323.9438

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with Vector Solutions to deliver an online learning management system (LMS) and safety/risk management platform.

This web-based LMS provides access to a wide range of training topics, which are included with your membership, and others at a negotiated rate\* exclusive to PRISM members.

## Training Topics Include

- Business Skills/HR & Microsoft Office Suite
- Professional Development: Communication, Customer Service and Leadership
- Fire, Water, and Law Enforcement Training\*

\* = PRISM member exclusive negotiated rates



### 24/7 Access

"Anytime, anywhere" access to top-quality courses in a wide range of risk management and general business areas.



### User Friendly Application System

Training records keeping has never been easier! Electronically produce timely reports with a few clicks of a button.



### Value-Added Benefits

Access many of these trainings at no extra cost as a value-added benefit of your membership.

## Quick Start Steps

1. Go to <http://prism.vectorsolutions.com/> to take sample courses, view the entire catalog of course offerings, and find out more about the features & benefits of the platform.
2. Contact Christian Kelly, Customer Success Manager at Vector Solutions by phone: 813.323.9438 or email: [christian.kelly@vectorsolutions.com](mailto:christian.kelly@vectorsolutions.com).
3. Christian will send a user profile Excel spreadsheet to complete. Employee information (name, department, email, etc) will need to be provided for all employees you wish to enroll so that they can be loaded into the platform.
4. Administrator Training is available via bi-weekly webinars on various topics or one-on-one sessions provided by Vector Solutions.
5. System Roll Out – Vector Solutions can provide assistance as you communicate with employees regarding this new (or refreshed) Learning Management System. They will help you share employee log-in information to launch the service.
6. Ongoing Customer Service – Vector Solutions has excellent ongoing customer service to help at any step of the way in the implementation process, but it won't stop there. They are committed to providing ongoing support.

# ON-DEMAND WEBCAST TRAINING SERVICES

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*PRISM partners with the industry's best to provide services that are second to none.*

To get started, please contact:

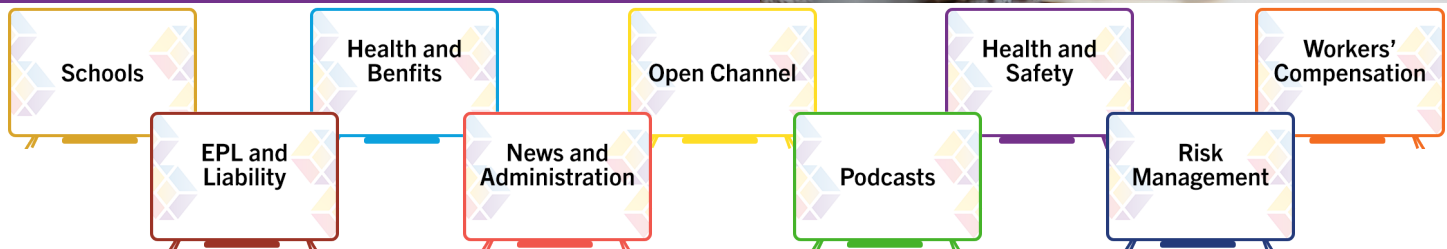
PRISM Risk Control

[riskcontrol@prismrisk.gov](mailto:riskcontrol@prismrisk.gov) | 916.850.7300

Our PRISMtv solution offers live training sessions, as well as 24/7 access to on-demand webcasts. Choose from a myriad of risk management topics from workers' compensation, liability, property and health programs via a customized platform for PRISM members and their employees.

## Channels Include

- Schools
- EPL and Liability
- Health & Benefits
- News & Administration
- Open Channel
- Podcasts
- Health and Safety
- Risk Management
- Workers' Compensation



## Quick Start Steps

1. Type the following into your browser:  
[www.prismrisk.gov/tv](http://www.prismrisk.gov/tv).
2. Each employee that wants to access PRISMtv, will need to register by providing their name, email address, organization and industry in the required fields. After initial registration employees will access the platform with just their email address.
3. The email address used for registration and access needs to be a work email address. Note: personal email domains, such as @gmail.com or @hotmail.com will not work.
4. Upon entering PRISMtv for the first time, a system check is run which will identify any computer requirements that need to be addressed for the webcast to run smoothly.
5. Pop-up blockers must be disabled and all webcasts require high speed internet.
6. If you still have issues entering PRISMtv, please contact Risk Control at [riskcontrol@prismrisk.gov](mailto:riskcontrol@prismrisk.gov) or 916.850.7300.
7. Once you have successfully logged in, you will find 8 channels to choose from, with a search feature in the top right-hand corner.

# PROPERTY RESTORATION EMERGENCY SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with BELFOR USA Group for Property Restoration Service Preferred Rates and Invoice Conditions, which are now available to PRISM members. Regardless of the size, location, or nature of the catastrophe, you can count on BELFOR to help rebuild properties, lives, and communities.

## Services Include

- **Water Damage:** Quick response to mitigate flooding, leaks, and restore your property.
- **Fire Damage:** Comprehensive cleanup and restoration for smoke, soot, and structural damage.
- **Storm Damage:** Emergency repairs and recovery from wind, hail, and severe weather.
- **Mold Damage:** Effective mold removal and prevention to protect health and property.



### Communication

Members will work directly with BELFOR for restoration needs.



### Experience

Belfor has been in business since 1946 and is known as the largest and most experienced disaster recovery company.



### Discounted Pricing

Prices have been negotiated with our public entity's needs in mind.

## Quick Start Steps:

1. If you are a part of the PRISM Property Program, please reach out to [Bob Frey](#), Alliant Insurance Services Claims Manager.

Phone Number: 415.403.1445

2. If you are NOT a part of the PRISM Property Program, please reach out to [David Warters](#), BELFOR's Regional Manager.

Phone Number: 510.887.9106



To get started, please contact:  
 Tim Cross, Channel Partner Specialist  
[tcross@hsi.com](mailto:tcross@hsi.com) | 509.412.7062



# SAFETY DATA SHEET (SDS) MANAGEMENT SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with the Health & Safety Institute (HSI) to provide exclusive bundles for PRISM members.

SDS Management has never been so easy, until now. Take the guesswork out of meeting HazCom requirements with easy-to-use chemical management compliance solutions.

## Services Include:

- Unlimited Access - Keep all SDS in one place, accessible to an unlimited number of workers
- Ad-Hoc Reporting - Quickly generate inventory and chemical constituent reports to meet local, federal, and internal requirements
- Secondary Container Labeling - Quickly print GHS-compliant secondary container labels



### SDS Refresh

Work with HSI to continually monitor and refresh your SDS document collection.



### Consulting Services

Available to assist with implementation of your chemical management program.



### Discounted Prices

Service bundles have been specifically designed for unique public entity needs.

## Quick Start Steps

1. Visit: <https://goto.hsi.com/prism> and complete the information request, or contact Brett and let him know you are a PRISM member and interested in safety data sheet management services.
2. Work with Brett to determine which bundle (standard or premier) is best for your agency.
3. Determine if you will use HSI's on-site inventory service (for an additional fee) or if the inventory can be completed by your agency. Then, complete a service agreement with HSI.
4. Work with HSI to customize location, site and department structures within the software.
5. HSI will provide user and administrator training to assist with roll out of the program.

# SIDEWALK ASSESSMENT & MAINTENANCE SERVICES

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*PRISM partners with the industry's best to provide services that are second to none.*

To get started, please contact:  
Joseph Ortega, Vice President of Business Development  
[jortega@pccnorcal.com](mailto:jortega@pccnorcal.com) | 650.576.4303

PRISM has partnered with Precision Concrete Cutting to offer professional sidewalk assessments and maintenance services. With franchises throughout the state, they are poised to help public agencies reduce sidewalk trip hazards. Their services will repair trip hazards, uneven sidewalks, concrete paths, footpaths, and any other type of damaged walkways; therefore, reducing risk and liability.

## Services Include:

- Sidewalk condition assessment and data collection
- Trip hazard removal
- Patented concrete cutting technology resulting in minimal disruptions and a safe work area
- Annual maintenance program
- GIS compatible assessment data



**No Sidewalk Closures**



## ADA Compliant and Non-Slip Surface

Cutting creates surface matching the adjacent panels with an ADA compliant slope.



## Negotiated Rates

Service bundles have been specifically designed for unique public entity needs.

## Quick Start Steps

There are 4 Precision Concrete Cutting (PCC) Franchises located throughout California. If you are unable to determine the franchise that services your area, contact **Joseph Ortega**, who will direct you to the appropriate representative.

**Northern California - Joseph Ortega**  
[jortega@pccnorcal.com](mailto:jortega@pccnorcal.com) | 650.576.4303

**Los Angeles and Imperial Valley Areas - Gary Beneduci**  
[gary@safesidewalks.com](mailto:gary@safesidewalks.com) | 858.699.1089

**Temecula / San Diego - Kevin Stengel**  
[kevins@pcctriphazardremoval.com](mailto:kevins@pcctriphazardremoval.com) | 760.889.2593

**Long Beach Area - Ron Durna**  
[socalpcc@safesidewalks.com](mailto:socalpcc@safesidewalks.com) | 909.539.7740

1. Determine which type of service agreement you will enter with PCC.
  - a. Sidewalk Assessment - charged by the total miles assessed
  - b. Trip Hazard Removal – charged by the size of the hazard removed
  - c. Annual Maintenance Program - performed annually, semi-annually or quarterly as determined by your agency
2. Mention that you are a PRISM Member to take advantage of the negotiated rates.
3. Complete agreement with Precision Concrete Cutting.

# SUBSTANCE ABUSE PROFESSIONAL (SAP) SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with Dr. Harelson, a certified addiction specialist serving California and Nevada, to provide members with SAP services. He is also Department of Transportation (DOT) qualified to provide SAP services for drivers who fall under the Federal regulations.

## Services Include

- Face-to-face or telemedicine consultation available
- Initial evaluation within DOT required 72 hours and written report
- Follow up evaluation and written report
- Early return-to-work evaluation (upon employer request)
- DOT Drug & Alcohol Clearinghouse SAP reporting

 Robert W. Harelson  
Psy.D., SAP

To get started, please contact:  
Robert W. Harelson, Psy. D, SAP  
robertharelson@aol.com | 925-639-2555



### Personal Service

As the sole proprietor, consultation is done directly with Dr. Harelson.



### Experience

Dr. Harelson has over 40 years of experience in the industry and has performed hundreds of substance abuse evaluations.



### Discounted Pricing

Prices have been negotiated with your agencies' needs in mind.

## Quick Start Steps

1. Visit [www.subabuseprofessional.com](http://www.subabuseprofessional.com) to learn more about Dr. Harelson and the services he provides.
2. Let Dr. Harelson know you are a PRISM member.
3. Discuss with Dr. Harelson which payment option works best for your agency, either a direct agreement or pre-payment.
4. Ensure Dr. Harelson and your agency's Designated Employer Representative (DER) have exchanged contact information.
5. In the event that a positive drug or alcohol test result is received, refer the employee to [Dr. Harelson](#) for evaluation.

# WORKFORCE MANAGEMENT SOFTWARE

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To get started, please contact:  
Kegan Konrady, Regional Sales Manager  
[Kegan.Konrady@vectorsolutions.com](mailto:Kegan.Konrady@vectorsolutions.com) | 858.376.1634

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with Vector Solutions to bring you Scheduling by CrewSense, a Workforce Management Software designed specifically for our mission-critical members (fire, law enforcement, EMS).

Coordinate schedules and oversee employee hours. Manage overtime and simplify communications with this cloud-based system.

## Services Include

- Cloud-hosted crew scheduling.
- User friendly software for administrators and end users.
- Fully customizable scheduling tools including emergency recalls and overtime staffing.



### Intuitive Dashboard

Make schedule adjustments using intuitive dashboard. View changes in real time.



### Mobile Ready

Oversee shifts from mobile app or web-enabled devices.



### Discounted Pricing

Prices have been negotiated with your agencies' needs in mind.

## Quick Start Steps

1. Contact [Kegan Konrady](#) for a demo or to answer any of your questions.
2. Pricing is based on the number of users in your agency.
3. Administrators will be given one-on-one training to ensure a successful launch.

# CATASTROPHIC CLAIMS MANAGEMENT SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

Paradigm Catastrophic Claims Management focuses on providing medical coordination and family support for injured workers suffering from catastrophic injuries. Working in collaboration with families, medical providers, employers, and insurers, Paradigm helps return the injured worker to the best possible life.

## Services Include

- Dedicated care management team of expert clinicians focused on optimal medical recovery
- Comprehensive care plan, guaranteed to achieve the highest possible clinical outcome for the injured worker
- Navigating a complex healthcare system
- Coordinating the multiple aspects of care

# Paradigm

To get started, please contact:  
Lori Reid, Director of Key Accounts  
[lori.reid@paradigmcorp.com](mailto:lori.reid@paradigmcorp.com) | 800.397.6517



### Physician Consultation

Routine treating physician consultation with a highly specialized Paradigm Medical Director



### Access

Top providers and centers of excellence



### Fixed Price

Includes all medical costs from the date of injury until the guaranteed clinical outcome is achieved

## Quick Start Steps

1. To make a referral, call the Paradigm Referral Team at 1.877.875.9479 or visit [www.paradigmcorp.com/catastrophic/referral-case](http://www.paradigmcorp.com/catastrophic/referral-case) and select one of the following:
  - Complete the online Catastrophic Referral Form - OR -
  - Download the form and fax to: 925.676.2197 or email it to [referrals-catastrophic@paradigmcorp.com](mailto:referrals-catastrophic@paradigmcorp.com)
2. Advise Lori Reid, Paradigm Director of Key Accounts, that you have made a referral at [lori.reid@paradigmcorp.com](mailto:lori.reid@paradigmcorp.com).

# INJURY REPORTING & TRIAGE SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has contracted with Company Nurse to provide members with a first-call, first-reporting system that includes both a medical needs triage at the time of injury and a means of initiating the injury/incident reports. As a result, more injuries are designated as first-aid, while others are directed to the appropriate level of care.

## Services Include

- Access to registered nurses who provide self-care advice and medical referrals for on-the-job injuries.
- Validated and verified Provider Database to ensure referrals are made to the appropriate and available employer designated facility(ies).
- Monthly reports summarizing incidents and outcomes, and a list of partially completed First Report of Injury forms.



To get started, please contact:  
John Brigowatz, Sales Associate  
[jbrigowatz@companynurse.com](mailto:jbrigowatz@companynurse.com) | 480.374.2458



### 24/7/365 Access

Injuries can happen any time. Detailed injury reports get to the right people, right away.



### Proprietary Medical Response Platform

Efficiency matters - Company Nurse has technology that covers your best interest.



### Discounted Rates

Discounted pricing has been negotiated exclusively for PRISM members.

## Quick Start Steps

1. Contact [sales@companynurse.com](mailto:sales@companynurse.com) to review the process and details.
2. Sign the agreement of participation under PRISM's master contract.
3. A kick-off call with your team will be scheduled to communicate the enrollment process.
4. Fill out the enrollment template, including contacts, locations, and preferred providers. Company Nurse will do the heavy lifting and get this information validated, verified, and into their program.
5. You'll receive your toll-free number, client training portal, and communication materials.

# INVESTIGATIVE SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

iUnited, Inc. is a premier investigation firm specializing in insurance investigations for self-insured entities, third-party administrators, insurance carriers, public entities, and legal counsel. Our experienced team delivers accurate, timely, and cost-effective results by integrating advanced technology, data analysis, and AI-assisted workflows to enhance every investigation. By combining decades of proven real-world investigative expertise with modern tools, we streamline case analysis, optimize field investigations, and provide our clients with clear, actionable intelligence to reduce exposure caused by abuse and fraud.

## Services Include

- AOE/COE Investigations
- Surveillance & Activity Checks
- Background & Digital Footprint Investigations
- Medical Canvassing
- Subrogation Investigations
- Alive & Wellness Verifications
- Interactive Physician Surveillance Video



To get started, please contact:  
 Tim Muraki, President & Co-Founder  
[tim@iUnitedinc.com](mailto:tim@iUnitedinc.com) | 916.621.9849  
[www.iUnitedinc.com](http://www.iUnitedinc.com)



### AI Powered Analysis

Identifies red flags, inconsistencies, and actionable insights.



### Expedited Turnaround Times

Standard 14-day case completion on all assignments RUSH capabilities.



### Discounted Rates

Discounted pricing for PRISM members.

## Quick Start Steps

1. To make a referral to iUnited, Inc, call 916.621.9849, or email [mail@iunitedinc.com](mailto:mail@iunitedinc.com)
2. iUnited, Inc. will email you a list of services and a referral form; or, you may complete the form online <https://iunitedinc.viewcases.com/case/request/new/client>
3. iUnited, Inc will then contact you to confirm your referral, discuss investigative strategy and/or provide suggested customized investigative solutions

# MANAGED CARE CONSULTING SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

Donn & Company (DonnCo) optimizes medical bill review, case management and PBM products through audits, restructurings, and competitive bids.

## Services Include

- Bill review, case management and PBM audits
- Optimization of rates and fee structures, contracts, and performance standards
- Competitive bid bill review, case management, and PBM services
- Financially optimized, transparent, and high performing program model

## DONN & COMPANY

WORKERS' COMPENSATION MANAGED CARE ADVISORY

To get started, please contact:

David Donn, CEO

[ddonn@donnco.net](mailto:ddonn@donnco.net) | 415.409.3666



### Cost Containment

Lower medical cost containment fees for bill review and case management products



### Reduced Paid Medical

Higher savings and lower drug costs



### Transparency

Fully transparent program, compliant with the highest industry standards

## Quick Start Steps

1. Members of PRISM's Primary Workers' Compensation (PWC) program are automatically enrolled!
2. PRISM's Excess Workers' Compensation (EWC) members, please contact David Donn at 415.409.3666 or [ddonn@donnco.net](mailto:ddonn@donnco.net) for a complimentary preliminary evaluation, and preferred pricing for ongoing cost containment services oversight!

# MEDICAL TRANSPORTATION & LANGUAGE SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

ProCare provides Transportation and Language services focused exclusively on Workers' Compensation.

## Services Include

- **TRANSPORTATION:** Ambulatory, Wheelchair, Non-Emergency Stretcher, ALS/BLS, Air Ambulance
- **TRAVEL:** Commercial Flight Coordination, Hotel Accommodations, Rail/Bus Ticketing, Meal Vouchers
- **LANGUAGE:** On-site Interpretation, Instant Interpretation, Document Translation, and Conference Calls



To get started, please contact:  
Dwain Johnson, VP of Regional Sales  
[djohnson@theprocure.com](mailto:djohnson@theprocure.com) | 925.381.0417



### Guarantee

Supports Positive ID of Signature Triple Confirmation Guarantee



### Focus

Exclusive focus on Workers' Compensation



### Costs

Cost-efficient Management of Referrals

## Quick Start Steps

1. Choose your Service Type: Transportation, Language, Travel
2. Contact ProCare:
  - Call: 866.941.7878
  - Email: [customerservice@theprocure.com](mailto:customerservice@theprocure.com)
  - Order Online: [TheProCare.com](http://TheProCare.com)
3. Consider it Done!

# MEDICARE REPORTING SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

# ExamWorks

To get started, please contact:  
Sean Roberts, Account Executive  
[Sean.Roberts@examworks-cs.com](mailto:Sean.Roberts@examworks-cs.com) | 800.497.1368



PRISM has coordinated with ExamWorks to provide CMS (Center for Medicare/Medicaid Services) query and reporting services, as well as Medicare Set Asides (MSA).

## Services Include

- MMSEA Section 111 reporting service
- Medicare set aside allocation
- Evidence based MSA
- Conditional payment services



### Experience

ExamWorks has over 20 years of experience dealing with CMS



### Options

Suite of clinical services to assist along all phases of claim settlement process



### Cost-savings

We actively look for areas to mitigate the MSA process

## Quick Start Steps

1. Contact your local Account Executive to request a referral - OR - email [referrals@examworks-cs.com](mailto:referrals@examworks-cs.com) - OR - upload a referral to our web portal: <https://portal.examworks-cs.com>.
2. Request a review of your MSP Compliance Needs and receive a program that meets your needs.

# REHABILITATION CARE SERVICES

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Neuro  
Restorative™

To get started, please contact:  
Stacy Andreasen, Regional Director  
[Stacy.Andreasen@neurorestorative.com](mailto:Stacy.Andreasen@neurorestorative.com) |  
559.400.1978

*PRISM partners with the industry's best to provide services that are second to none.*

NeuroRestorative is a leading Provider of specialized sub-acute, skilled and post-acute rehabilitation services for people of all ages with brain injuries and other neurological challenges. In a variety of locations and settings, we offer a full continuum of care and rehabilitation options.

## Services Include

- Rehabilitation for brain injuries & other neurological challenges
- Full continuum of care
- Individualized programming



### Flexibility

Able to quickly move an injured worker to the most clinically appropriate treatment program



### Transparent

Outcomes reporting allows funders to review objective data



### Communication

Collaborative approach stresses a high level of communication with all team members

## Quick Start Steps

1. Place referral with NeuroRestorative
2. Gather patient information
3. Schedule a clinical evaluation
4. Acceptance and proposed plan of care
5. Arrange family tours
6. Arrange patient transfer and admission to the program/facility

# RETURN-TO-WORK SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM has partnered with NPA to offer our members a proactive Return-to-Work (RTW) service that is designed to benefit everyone - employers, employees and physicians. The OUR System® can drastically reduce workers' compensation costs, saving you time and money while laying the foundation for compliance with ADA and FEHA requirements.

## Services Include

- No upfront fees
- The Our System: gets workers back to work quickly!
- Monthly status reports
- Expert management of RTW services



To get started, please contact:  
NPA Return-to-Work Services  
[info@returntowork.com](mailto:info@returntowork.com) | 800.497.1368



### Communication

Close, open communications with Doctors, Supervisors, and Personnel



### OUR System

Bridge Assignments create productive work!



### Costs

PRISM PWC members receive lowest prices!

## Quick Start Steps

1. [Contact NPA](#) and mention you're a PRISM member in need of return-to-work services.
2. Schedule a webinar for your team, to learn how the OUR System works.
3. Send NPA your last 3 years of loss-run data.
4. NPA will write a custom proposal and outline about implementation of services.

# STRUCTURED SETTLEMENT SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

Noah Schwartz, a settlement annuity expert, designs structured settlement proposals and helps injured parties understand the benefits of each plan.

All documentation necessary to finalize structured settlements is prepared, and files are reviewed on-site to determine structured settlement potential for clients.

## Services Include:

- Providing attractive plans for plaintiffs to reduce total costs
- Assistance in mediations and settlement conferences
- Present value cost analysis on life care plans and economic losses
- Assistance in special needs trusts, MSA allocations, and lien resolution

OFFICES OF  
**NOAH S. A. SCHWARTZ**  
AT RINGLER ►  
Settlement Consulting

To get started, please contact:  
The Offices of Noah S. A. Schwartz  
[nschwartz@ringlerassociates.com](mailto:nschwartz@ringlerassociates.com) | 800.322.7585



### Best Outcomes

Best possibility of a good faith outcome for settlement.



### Prepared

All the tools necessary for success



### Quick Settlement

Cases statistically settle quicker and for less money with a structured settlement

## Quick Start Steps

1. Call the offices of Noah Schwartz as early as possible.
2. Provide all necessary data for the case.
3. If applicable, send over any medicals so that they can retrieve a rated age resulting in savings for the client.

# CRISIS INCIDENT MANAGEMENT & COMMUNICATION SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

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**MAINSTREAM**  
UNLIMITED

To get started, please contact:  
Robert "Bob" May, Founder & Principal  
biem47@outlook.com | 800.831.5529



## Consultation Services

A myriad of risk management and consulting services



## Team of Experts

Their team of highly experienced consultants tailor solutions to meet your agency's unique needs.



## Competitive Rates

Special pricing for consultation services are available through your membership.

## Pre - Crisis Training Services

*For training, please feel free to contact **Mainstream Unlimited** directly at 800.831.5529.*

- Regional training programs
- Emergency plans (review and development)
- Vulnerability assessments
- Webinars on critical incident management, communications, media management, and more!

Any member-specific, pre-crisis training may be contracted and paid for by the member at the discounted rates offered to PRISM members.

Members may also access their available subsidy balances to assist in covering those costs.

## Crisis Management Services

*Have a crisis? Contact us at **916.850.7700**.*

*Mainstream can serve in a lead or "second set of eyes" capacity, working with you and your PIO to help with:*

- Situation assessment
- Media consulting
- Public announcements
- Deployment of outside resources to member site

**These services will be provided to members upon approval by PRISM, and paid for by PRISM up to \$50,000 per incident.** Any costs above that would be paid for by the member.



# LEGAL ADVICE SERVICES

*PRISM partners with the industry's best to provide services that are second to none.*

PRISM's former General Counsel, Steve Underwood, Esq. is available to members for assistance and/or consultation on various legal matters.

The Legal Advice Service is intended to support, not replace, your existing legal personnel.

## Services Include

- Brown Act, Public Records Act
- Contracts and other governmental legal review
- Statutory interpretation and other governmental issues



# PRISM

For more information, please contact:  
Skylar Golding, Member Services Technician  
[sgolding@prismrisk.gov](mailto:sgolding@prismrisk.gov) | 916.850.7300



### Unlimited Access

Access Steve Underwood's consultation services as often or as little as your entity needs.



### Value Added Benefit

Access this service at no extra cost as a value-added benefit of your membership with the PRISM.

## Quick Start Steps

1. To begin using the service, complete a '[Contact Information Form](#)', which will help assure that attorney-client privilege is maintained.
2. Return the completed form directly to Steve at [publicentity.law@gmail.com](mailto:publicentity.law@gmail.com).
3. You may submit a general question, provide some specific information on your individual matter, or simply request a return call. You may also call Steve Underwood directly at 805.705.6195.

## Contracts Made Simple

Three resources for your contract needs:

- The [Insurance Requirements in Contracts \(IRIC\) Manual](#) is a great resource for questions regarding contracts, limit suggestions, indemnification language
- [Contract Review assistance](#) is also available through Alliant for specific questions
- Contact [Steve Underwood](#) for consultation regarding contract questions.



# PRISM

For more information, please contact:  
Katie Mola, Deputy General Counsel  
[kmola@prismrisk.gov](mailto:kmola@prismrisk.gov) | 916.850.7400

# PRISM EMPLOYMENT PRACTICES LEGAL ADVICE SERVICES

*PRISM's legal staff are highly knowledgeable in labor and employment law matters affecting California public entities. Examples of the support they provide include:*

- 
- Return to work issues;
  - Modified duty and reasonable accommodations;
  - Leave of absence management and tracking;
  - Harassment and retaliation prevention;
  - Responding to grievances and complaints;
  - Performance management;
  - Discipline;
  - Policy and handbook review;
  - Wage and hour compliance questions.



## Additional services included are:

1. Periodic webcasts
2. Interactive Process Manual for California Public Agencies
3. Managing Multiple Leaves of Absence Manual – For California Public Agencies

## Unlimited access:

- Access PRISM Labor & Law Employment Services as little or as often as your agency needs.
- Request an intake form today to get started!
- Contact Katie Mola at (916)850-7400 or [kmola@prismrisk.gov](mailto:kmola@prismrisk.gov) to begin the intake process.

# STRATEGIC PLANNING FACILITATION SERVICES



# PRISM

Public Risk Innovation,  
Solutions, and Management

For more information, please contact:  
Rick Brush, Chief Member Services Officer  
[rbrush@prismrisk.gov](mailto:rbrush@prismrisk.gov) | 916.850.7300

## Facilitator Bio

Rick Brush is the Chief Member Services Officer for the Public Risk Innovation, Solutions, and Management (PRISM), one of the largest self-insurance pools in the nation with approximately 2,050 public agency members. Rick is responsible for strategic initiatives for both PRISM and its captive insurance company, the Excess Insurance Organization. He is an integral part of the Senior Management team and is responsible for the delivery of professional and reliable risk management services to PRISM members. In addition, he helps to identify and create future program enhancements.

Previously, Rick worked at Bickmore, a risk management consulting firm, where he led the formation of five self-insurance groups (was the Administrator for one of them), and was the Administrator for a joint powers authority of twenty-one school districts.

Prior to that, Rick was the CEO of the California Society of Association Executives (CalSAE), the third largest society of association executives in the nation.

## Perspective

Having been the CEO, Administrator and staff liaison of an organization, working with many strategic planning facilitators, Rick is well aware of the needs and expectations of staff. Having been a board member of many organizations, he also knows what it is like to sit in the seat of a board member. This gives him a unique perspective and understanding of the roles of each person in the room during a strategic planning session.

## Specialties

- Strategic Planning
- Board Leadership
- Board Management
- Risk Management
- Relationship Building
- Strategic Partnerships

References are available upon request.



## INTRODUCTION

They say that many golf bets are won or lost on the first tee . . . it's what is negotiated prior to the first tee shot that will determine the outcome of the day. The same applies to successful strategic planning session outcomes!

With nearly thirty years of working in organizational management, fourteen years with local, state and national associations, and fifteen years with self-insured risk management pools, Rick Brush has been a part of many strategic planning sessions that ranged from excellent to not very productive. These experiences fueled his passion to create the "Perfect" strategic planning session and to provide this service to organizations.

He has spent his career working with groups of individuals and engaging them for the collective benefit of their group – in other words, getting board members to take off their individual hats, wear the hat of the organization, and figure out how they can best work together to plan the organization's future. His style is personal and collaborative, creating an environment that is comfortable to openly share information, debate in a constructive manner, and come to specific agreed upon goals.

## THREE PARTS TO A SUCCESSFUL STRATEGIC PLANNING SESSION

### BEFORE THE MEETING

Work that happens prior to the strategic planning meeting sets the stage for the day. Before the meeting, Rick will work with staff to establish a timeline to interview staff and key board members, create a survey to be sent to all participants, and make sure the table is set for a productive meeting. This is the foundation that enables the group to dive into matters swiftly and head on, so that on the day of the meeting, they will be engaged right from the start.

### DURING THE MEETING

The best facilitators are simply that – facilitators of discussion. Rick does not impose his opinions into your process and deliberations, but will artfully lead discussions, recognize sticking points, know how to overcome them, and work to build consensus towards setting goals. This is the "What" phase, meaning "What" should be the organization's focus.

### AFTER THE MEETING

He will work with your staff to build a report that is clear and concise, creating a useful document to implement the "How" phase. The report will document Strategic Goals, Outcomes, and Milestones. It will be used by staff to establish priorities, build timelines, identify responsible parties, and determine any necessary additional resources.



# INDEX

(Click on the titles below to view individual service Quick Start Guide)

## Partner Programs

- Active Violence Emergency Response Training (Health and Safety Institute).....Tim Cross, [tcross@hsi.com](mailto:tcross@hsi.com), 509.412.7062
- Background Check Services (Plexus Global).....Plexus Global Info Line, [info@plexusglobalinc.com](mailto:info@plexusglobalinc.com), 844.516.1008
- Catastrophic Claims Management (Paradigm).....Lori Reid, [lori.reid@paradigmcorp.com](mailto:lori.reid@paradigmcorp.com), 800.397.6517
- Checkpoint System (Guard1).....Jody Cattoor, [jcattoor@gaurd1.com](mailto:jcattoor@gaurd1.com), 216.595.0890
- Certificate of Insurance Management Services (Evident).....Bryan Cogliano, [bcogliano@evidentid.com](mailto:bcogliano@evidentid.com), 949.432.1986
- CPR, First Aid, AED (Health and Safety Institute).....Tim Cross, [tcross@hsi.com](mailto:tcross@hsi.com), 509.412.7062
- Crisis Incident Management and Communication (Mainstream Unlimited).....Robert May, [biem47@outlook.com](mailto:biem47@outlook.com), 800.831.5529
- Drug and Alcohol Testing Services (Plexus Global).....Destinee Zarate, [dzarate@plexusglobalinc.com](mailto:dzarate@plexusglobalinc.com), 951.335.4904
- Early Intervention System (Benchmark Analytics).....Alec Henderson, [alec.henderson@benchmarkanalytics.com](mailto:alec.henderson@benchmarkanalytics.com), 469.933.9366
- Employee Performance Evaluations (Vector Solutions).....Kegan Konrady, [kegan.konrady@vectorsolutions.com](mailto:kegan.konrady@vectorsolutions.com), 858.376.1634
- Employer Pull Notice (EPN) Program (Plexus Global).....Destinee Zarate, [dzarate@plexusglobalinc.com](mailto:dzarate@plexusglobalinc.com), 951.335.4904
- Equipment & Apparatus Inspection Software (Vector Solutions).....Steve Walsh, [steve.walsh@vectorsolutions.com](mailto:steve.walsh@vectorsolutions.com), 858.683.7745
- First Responder First Responder Services (TCTI).....TCTI Team Members, [prism@thecounselingteam.com](mailto:prism@thecounselingteam.com), 800.222.9691
- Injury Reporting & Triage (Company Nurse).....John Brigowatz, [jbrigowatz@companynurse.com](mailto:jbrigowatz@companynurse.com), 480.374.2458
- Investigative Services (iUnited).....Tim Muraki, [tim@iUnitedinc.com](mailto:tim@iUnitedinc.com), 916.621.9849
- Learning Management System (Vector Solutions).....Christian Kelly, [christian.kelly@vectorsolutions.com](mailto:christian.kelly@vectorsolutions.com), 813.323.9438
- Legal Advice Services (Steve Underwood).....Skylar Golding, [sgolding@prismrisk.gov](mailto:sgolding@prismrisk.gov), 916.850.7300
- Managed Care Consulting (Donn & Co).....David Donn, [ddonn@donnco.net](mailto:ddonn@donnco.net), 415.409.3666
- Medical Transportation & Language Services (ProCare).....Dwain Johnson, [djohnson@theprocure.com](mailto:djohnson@theprocure.com), 925.381.0417
- Medicare Reporting Services (ExamWorks).....Sean Roberts, [sean.roberts@examworks-cs.com](mailto:sean.roberts@examworks-cs.com), 800.497.1368
- On-Demand Webcasts (PRISMtv).....PRISM Risk Control, [riskcontrol@prismrisk.gov](mailto:riskcontrol@prismrisk.gov), 916.850.7300
- PRISM Employment Practices Legal Advice Services(PRISM).....Katie Mola, [kmola@prismrisk.gov](mailto:kmola@prismrisk.gov), 916.850.7400
- Property Restoration Emergency Services (BELFOR).....Check for Contact
- Rehabilitation Care (NeuroRestorative).....Stacy Andreasen, [stacy.andreasen@neurorestorative.com](mailto:stacy.andreasen@neurorestorative.com), 559.400.1978
- Return-to-Work (NPA).....NPA Return-to-Work Services, [info@returntowork.com](mailto:info@returntowork.com), 800.497.1368
- Safety Data Sheet Management (Health and Safety Institute).....Tim Cross, [tcross@hsi.com](mailto:tcross@hsi.com), 509.412.7062
- Sidewalk Assessment & Maintenance (Precision Concrete Cutting).....Joseph Ortega, [jortega@pccnocal.com](mailto:jortega@pccnocal.com), 650.576.4303
- Strategic Planning Facilitation (PRISM).....Rick Brush, [rbrush@prismrisk.gov](mailto:rbrush@prismrisk.gov), 916.850.7300
- Structured Settlements (Ringler).....Noah S.A. Schwartz, [nschwartz@ringlerassociates.com](mailto:nschwartz@ringlerassociates.com), 800.322.7585
- Substance Abuse Professional (SAP) Services.....Robert W. Harelson, [robertharelson@aol.com](mailto:robertharelson@aol.com), 925.639.2555
- Workforce Management Software (Vector Solutions).....Kegan Konrady, [kegan.konrady@vectorsolutions.com](mailto:kegan.konrady@vectorsolutions.com), 858.376.1634