



# RIMSAIL

E-Newsletter – San Diego Chapter Risk & Insurance Management Society

Vol. 16 No. 1

January 2012

## PRESIDENT'S MESSAGE

This is my first President's Message to you as my new term began January 1<sup>st</sup> 2012. I want to thank you for the opportunity to serve as your San Diego RIMS Chapter President. With the help and support of my Board and all of the volunteers that greatly assist with our efforts, I look forward to this coming year of educational and informative meetings, events, fun activities and other interactions and networking to strengthen and improve one of the best RIMS Chapters in the World! The Board of Officers and Directors completed a very successful annual retreat the weekend of January 6<sup>th</sup> to the 8<sup>th</sup> on Catalina Island. With new Board members attending along with returning veterans, our planning and deliberations were very productive and fruitful. The board meeting participants including myself, Rich Johanson, Melissa Losasso, Lyn Hall, Cheryl Berman, Kim Pinkerton, George Ward, Liz Zepeda, BriAnne Purdy and Claire Anderson. Felicia Amenta's daughter had a sledding accident shortly before the retreat that kept Felicia home to assist with the hospital and recovery. This year, we had a very special guest who accepted our invitation to attend. Ms. Deborah M. Luthi, the incoming RIMS President for 2012, also actively participated in our collaborations and her insight and valuable experience was well received.

We added Friday afternoon this year in order to accommodate the Board's strategic planning and development of a new vision and mission statement, with corresponding goals and objectives utilizing a template of the Society's recently revised statement. Lyn Hall with Qualcomm contributed several guidelines that her department recently followed when they completed a similar project. All of these revisions are currently "jelling" until we discuss at the February 1<sup>st</sup> Board Meeting and approved. I will communicate the entire summary to you in the upcoming February RIMSail issue.

The retreat reconvened on Saturday morning at 8:30 am and our established protocol of financial review and approval, tentative calendar of events, Board meeting dates, committee structures, student outreach, membership and Chapter Administration was discussed. We adjourned at 4:35 pm and at 7 pm enjoyed a wonderful dinner at Steve's Steakhouse.

The first two Chapter meetings for 2012, organized by our new Vice President Felicia Amenta, with the cooperation of our distinguished speakers, are billed as "Part 1 and Part 2" on Workplace Violence. So, you want to plan on attending **both** meetings. This month on Thursday, January 26<sup>th</sup>, Kimberly D. Dyess, Esq. with Grandell, Lebovitz, Stander, Reubens and Thomas will present on "Stress Claims Arising from Workplace Violence." At the February Leap Year Meeting (actually Thursday March 1<sup>st</sup>), Cathi Marx, ALCM, CHS-V, COSS, Vice President with Aspen Risk Management Group, will review "Workplace Violence & Threats: Criminals, Co-Workers & Kin." Both Meeting notices are included so please RSVP to Felicia as soon as possible.

On January 12<sup>th</sup>, I attended the memorial service conducted for our Associate Member William "Bill" Werber, CRM, who passed away on his 63<sup>rd</sup> birthday, December 18<sup>th</sup> 2011. The amount of love and support from his family, friends and clients at the Admiral Kidd Club, Naval Base Point Loma was, from my perspective, a tribute to the life, service and dedication. Bill unselfishly gave to his family and profession and to this community. To close, I am including a simple, but important, statement from a small card attached to a memento distributed at his memorial.

*"There are souls in this world who have the gift of finding the positive side to any situation and leaving that positive spirit behind when they go. Bill's indomitable spirit will live on in the hearts of all of the people whose lives he touched."*

Let's carry on with Bill's professionalism, sense of purpose and his attitude for life!

Respectfully,  
  
 San Diego RIMS President



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*A Monthly Publication*

Submit articles by e-mail to:  
rimsail@cox.net

or mail it to:

San Diego RIMS  
P.O. Box 85307  
San Diego, CA 92186

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\*New Board Member for 2012

June 3-5 | Washington, D.C.

## KNOW RISK, TALK RISK



Save the date for the 14th Annual RIMS on the Hill Legislative Conference

Spend two-days influencing the future of risk management

On Monday, educational panels and strategy sessions will brief you on the hot issues and teach you the secrets to lobbying success. Tuesday you'll take those skills to Capitol Hill and put what you learned into action and apply your new-found lobbying skills to your discipline, your sector and your state.

Don't miss this rare opportunity to talk risk with other risk professionals and your legislators to advance your own personal, professional and organization's business goals.

**Make your voice heard. Mark your calendar and SEIZE THE ADVOCACY ADVANTAGE!**

Park Hyatt Washington  
24th and M Streets, NW  
Washington, D.C.  
Registration fee: \$100

[www.RIMS.org/Hill](http://www.RIMS.org/Hill)

## MISSION STATEMENT

*The mission of the San Diego Chapter of the Risk and Insurance Management Society, Inc. is to promote and improve Risk Management through education, networking, peer review and community service, in a dynamic environment, which furthers the growth and development of our members.*

# Benefits Buzzz

Submitted by Cindy Titgen,  
Benefits & Workers' Comp  
Manager for the City of Escondido



As part of health care reform, insurance carriers must provide an annual accounting by employer of premiums received and claims paid out to HHS (Department of Health & Human Services). If the claims to premium are under the 85%, carriers must provide a rebate to policyholders. In the past, there was a general question as to who would be responsible for distributing the rebate to employees (does not apply to self-funded plans).

Well employers, it once again falls upon our shoulders.



1. If rebates are to be paid, the insurance company will pay this to the employer (policyholder).
2. Employers then must apply the portion of the rebate attributable to employee contributions in the form of a cash payment or a reduction in future contributions toward the cost of the coverage.

Won't this be fun!

# MEMBER SPOTLIGHT

Submitted by Claire Anderson, San Diego RIMS Board of Director

This quarter's spotlight is on a new member who has helped bring the language of risk to the forefront at the University of California San Diego. Debbie Rico grew up in Minnesota, moving to San Francisco after her freshman year of college to search for new and interesting experiences. She and her husband moved to San Diego for school and the city quickly became home. Their daughter recently graduated from UCLA and will be attending Thomas Jefferson School of Law.

Debbie obtained her BS in Business Administration with an emphasis in Accounting from SDSU and earned her CPA immediately after college while working for KPMG.

Debbie gained her first management experience as assistant treasurer for a real estate syndication company and from there moved on to become controller of the Daily California for thirteen years. Following her tenure at the magazine, Debbie became a consultant for the University of California and, just two years later, UCSD asked her to join their team full time. Debbie is now Assistant Controller of Assurance and Accountability for UCSD, developing and implementing accountability and control initiatives, controlling



policy and communication throughout the campus, developing training and educational opportunities, and using resources effectively to mitigate business risk.

Eight years ago, a study of sample transactions brought risk language to the forefront at UCSD. Internal controls were implemented to create a foundation for the understanding and mitigation of risk. The C.A.R.E (Compliance, Audit, Risk and Ethics) team serves as a subgroup of UCSD's enterprise risk management function. Although the group is heavily focused on compliance, Debbie and her colleagues are developing the program into one that is more focused on getting results after the identification and evaluation of risks.

Debbie joined RIMS after hearing about the San Diego ERM conference, which she found to be very beneficial and allowed for networking with other members who share similar needs and can offer ways for Debbie and her team to not only understand their company-wide risks, but to choose a risk appetite and spread an understanding of risk management throughout the UCSD community. Welcome to RIMS San Diego Debbie! ♦

## 2012 SAN DIEGO RIMS CHAPTER EVENTS

DATE	EVENT	PLACE
Thurs., Jan. 26, 2012	<b>January Chapter Meeting</b> Topic: Stress Claims Arising from Workplace Violence	Handlery Hotel and Resort, Mission Valley
Thurs., March 01, 2012	<b>February Chapter Meeting</b> Topic: Workplace Violence & Threats, Criminals, Co-Workers and Kin	Handlery Hotel and Resort, Mission Valley
Thurs., March 29, 2012	<b>March Chapter Meeting</b> Topic: Training Resources and Classes for Risk Professionals	Hilton Garden Inn, Del Mar
Thurs., April 26, 2012	<b>April Chapter Meeting &amp; Spring Food Drive</b> Topic: Ever Changing Status of Medicare Set Asides & Conditional Payments or other Liability Topic	Handlery Hotel and Resort, Mission Valley
April 15-19, 2012	<b>RIMS 2012 Annual Conference &amp; Exhibition</b>	Philadelphia, PA
Thurs., May 24, 2012	<b>Half Day Educational Seminar</b> Topic: Insurance Committee	TBD
Thurs., June 21, 2012	<b>Deputy Member Site Visit Event</b>	TBD
Fri., August 10, 2012	<b>Annual Golf Extravaganza and Tournament</b>	Coronado Municipal Golf Course
Thurs., September 27, 2012	<b>Half Day Educational Seminar</b> Topic: Workers' Compensation Committee	TBD
September 17-20, 2012	<b>Western Regional Conference</b>	Cheyenne Mountain Conference Resort, Colorado Springs, CO
Thurs., October 25, 2012	<b>Annual Deputy Membership Meeting and Board Elections</b>	Qualcomm, Inc.
Thurs., November 15, 2012	<b>November Chapter Meeting &amp; Fall Food Drive</b> Topic: PERK Program	TBD
Thurs., December 13, 2012	<b>Chapter Holiday Luncheon</b>	Kona Kai Resort & Hotel, Shelter Island

# MEMBERSHIP DRIVE

Here's how it works:

1. Bring a potential deputy member (risk manager, safety manager, etc.) to a monthly meeting;
2. The chapter will pay the cost of that lunch for the potential member (one time only);
3. Your name will be entered for a special drawing at the January 2013 meeting for a fabulous prize (not yet determined);
4. You can get a drawing entry for every potential member you bring until December 2012.

This may sound familiar since this will be the seventh year we have been running the program. It is a great opportunity so see you at the next meeting with a guest!

## NEW MEMBER WELCOME

*Welcome to our newest associate members!*

**Theresa Petersen**  
Frasco Investigative Services

**Jim Potter & Victor Gonzalez**  
Fire and Life Safety

*We look forward to your future participation in the Chapter!*



## CALLING ALL SPEAKERS!

Have you recently participated in a seminar, conference, or industry meeting as a speaker? Will you be in the near future? If so, please let us know! We would like to acknowledge your efforts to Advance the Risk Management profession! Mail a copy of the event announcement to the Chapter's P.O. Box or e-mail it to any of the Board Members!



## MARK YOUR CALENDARS!!

The Rocky Mountain Chapter is excited to announce:  
**Mountains of Opportunities in A New Era of Risk**  
2012 Western Regional Conference

September 17-20, 2012  
Cheyenne Mountain Conference Resort  
Colorado Springs, Colorado

For calendar and budgeting purposes,  
Registration Fee: \$395 Deputy Members  
\$445 Associate Members, \$459 Non-Members  
Resort room rate: \$169 plus \$15 resort fee  
Conference rate extended for one day prior to and after conference  
More information to follow in 2012



## UPDATING YOUR MAILING ADDRESS AND CONTACT INFORMATION

Submit contact changes via the Chapter's website at [www.sandiegorims.org](http://www.sandiegorims.org) (click on "Update Your Info" on the Home Page), or mail changes to the attention of:

Membership Director  
San Diego RIMS  
P. O. Box 81244  
San Diego, CA 92138-1244



If you have not received meeting notices or your copy of RIMSail via e-mail, please update your e-mail address.



Risk & Insurance Management Society  
San Diego Chapter

## JANUARY 2012 MONTHLY MEETING NOTICE

Make Checks Payable to:  
San Diego Chapter  
P. O. Box 81244  
San Diego, CA 92138

### TOPIC: Stress Claims Arising from Workplace Violence

Our Meeting topic for January is Stress Claims Arising from Workplace Violence. Mental stress cumulative trauma injuries are among the most challenging claims to handle in the workers' compensation system and are being filed with ever-increasing frequency in California. This presentation will review the legislative and case history that resulted in the current state of affairs for the California work comp approach to psychiatric claims. The presentation will legally define workplace violence, evaluate the financial impact of such violence and the upward trend of mental disorder and psyche claims based on "job stress." The presentation will provide some prevention strategies, investigative strategies and a plan for employers to reduce lost time if such a claim is admitted.

Our speaker is: Kimberly D. Dyess, Esq.  
Branch Managing Attorney  
Grancell, Lebovitz, Stander, Reubens and Thomas



### WHO SHOULD ATTEND

Work Comp Managers, Human Resources Managers, Risk Managers, Financial Directors, Senior Management, Public and Private Sector Entities and Joint Power Authority Directors.

### MEETING DETAILS

**WHEN:** Thursday, January 26, 2012

11:15 – 11:45am Registration, Check-In, and Networking  
11:45 – 1:30pm Meeting

**WHERE:** **Handlery Hotel and Resort**  
950 Hotel Circle North  
San Diego, CA92108  
Hotel Phone: (619) 298-0511

**MENU:** Chicken Piccata – Grilled Boneless Breast of Chicken, Served on Angel Hair Pasta with Creamy Lemon Capers Cream Sauce and Market Vegetables  
**AND** Coffee with Dessert  
*NOTE: Please email vegetarian lunch requests to the contact below.*

**COST:** \$35 for Members / \$40 for Guests of a Member / \$50 for Non Members  
\$10 Additional for Late RSVP and walk-ins – No shows will be billed

**RSVP:** TWO WAYS FOR MEMBERS TO REGISTER **NO LATER THAN 1/23/12**

- [RIMS Chapter online registration](#)

**OR**

- Send an e-mail to Felicia Amenta at [famenta@sdcoe.net](mailto:famenta@sdcoe.net) and advise the full name(s) of the attendee(s) and guest(s).

### QUESTIONS?

Contact: Felicia Amenta at (858) 571-7221  
**Remember: No shows may be billed for meals.**



Risk & Insurance Management Society  
San Diego Chapter

## MARCH 2012 MONTHLY MEETING NOTICE

Make Checks Payable to:  
San Diego Chapter  
P. O. Box 81244  
San Diego, CA 92138

### TOPIC: Workplace Violence & Threats; Criminals, Co-Workers and Kin

Our Meeting topic for March 1st is part II in the series of about workplace violence. In January the discussion focused on types of claims that are a result of workplace violence, and the legal definition of such violence. In March we will delve into the “sources” of workplace threats and resulting violence. What are the workplace trends? Who are the perpetrators? What are the human resources and risk management strategies that should be taken to reduce the probability of violence in your workplace? In this presentation we will discuss the four categories of workplace violence, how domestic violence is affecting workplace violence statistics in increasing numbers and finally; should the unthinkable occur, we will review the recommended actions to be taken during an “active shooter” event.

Our speaker is: Cathi L. Marx, ALCM, CHS-V, COSS  
Principal and Vice President Risk Management  
Aspen Risk Management Group

**Aspen Risk Management Group**

### WHO SHOULD ATTEND

Work Comp Managers, Human Resources Managers, Risk Managers, Financial Directors,  
Senior Management, Public and Private Sector Entities and Joint Power Authority Directors.

### MEETING DETAILS

**WHEN:** Thursday, March 1, 2012

11:15 am – 11:45am Registration, Check-In, and Networking  
11:45 am – 1:30 pm Meeting

**WHERE:** Handlery Hotel and Resort  
950 Hotel Circle North  
San Diego, CA 92108  
Hotel Phone: (619) 298-0511

**MENU:** Smoked Pork Loin –Herb Roasted Loin with Mint Tomato Jam  
Vegetarian Wellington – Portobello Mushroom and Marinated Grilled Vegetables Wrapped in Puff Pastry, Served with Red Pepper Coulis  
**AND** Coffee with Dessert

**NOTE:** *Please email vegetarian lunch requests to the contact below.*

**COST:** \$35 for Members / \$40 for Guests of a Member / \$50 for Non Members  
\$10 Additional for Late RSVP and walk-ins – No shows will be billed

**RSVP:** TWO WAYS FOR MEMBERS TO REGISTER **NO LATER THAN 2/27/12**

1. [RIMS Chapter online registration](#)

**OR**

2. Send an e-mail to Felicia Amenta [famenta@sdcoe.net](mailto:famenta@sdcoe.net) and advise the full name of the attendee and guest(s).

### QUESTIONS?

Contact: Felicia Amenta at (858) 571-7221  
**Remember: No shows may be billed for meals.**

# Pacific Safety Council Annual Conference & Luncheon

*featuring* a Luncheon presentation by our very own *Joe Mazza*

## Option A: Conference only

Session 1  
**OCCUPATIONAL MATH 101**  
How a safety professional's contributions provide a positive financial impact by reducing employee injuries, lost work time, and claims.  
Cathi Marx, ALCM, COSS, CHS-5  
Aspen Risk Management



Session 2  
**SHOOTER IN THE WORKPLACE!**  
How an employer should respond and what to expect from law enforcement.  
Lt. Joe Ramos  
San Diego Police Dept. - SWAT



Session 3  
**FIRES! EARTHQUAKES! BLACKOUTS! OH MY!**  
With a disaster always looming, employers must know their responsibilities & available resources  
Leslie Luke  
Program Manager, County of SD Office of Emergency Management

Session 4  
**CONSEQUENTIAL SAFETY**  
DUI's, distracted driving, and your employees.  
Officer Brian Penning  
California Highway Patrol



**7:30am - 11:30am**  
\$69 member / \$79 non-member

## Option B: Luncheon only

Session 5  
**SMARTPHONE SAFETY**  
Employers must create smartphone policies that reduce employee incidents and injuries to minimize employer liability.  
Joe Mazza, ARM-P  
Mira Costa College



**11:30am - 1:00pm**  
\$89 member / \$49 non-member  
Tables of 6 are available for \$199

## Option C: BEST VALUE

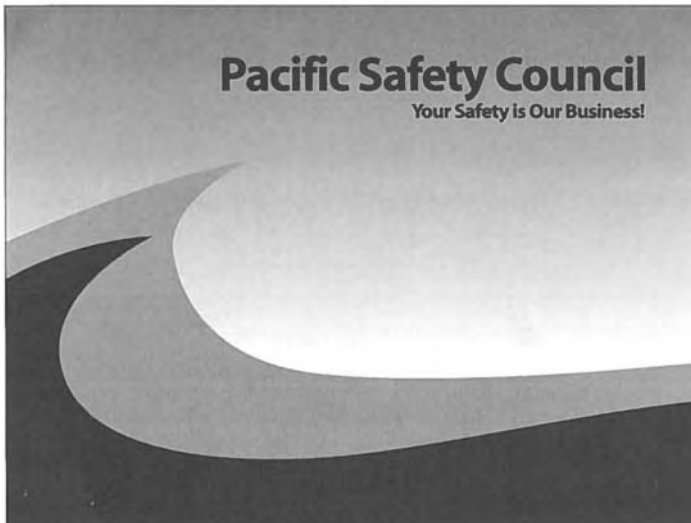
Conference AND Luncheon

**7:30am - 1:00pm**  
\$89 member / \$109 non-member  
Tables of 6 are available for \$499

**REGISTER NOW!**



A SPECIAL  
THANK YOU  
NOTE TO  
SAN DIEGO  
RIMS FROM  
PACIFIC SAFETY  
COUNCIL.



### Our Mission...

The Council is dedicated to making our communities safer places to live, learn, work and play by providing quality education, information programs and events. Partners for Life!



9880 Via Pasar, Suite F • San Diego, CA 92126  
858-621-2313 • 888-846-4200 • 858-689-0040 Fax  
www.safetycouncilonline.com

Thank you for very much for your donation. We greatly appreciate it!  
Maria

Thank you very much for supporting our work!  
James

Thank you so much for the generous donation. We truly value your confidence. WE APPRECIATE YOUR SUPPORT!  
HRIS MALICK

Thank you for your donation - J.J.

Thank you so much for your support + love!  
Nicole

# Thank You

Thank you for your continued support of PSC. We truly value the donation!  
Nicole

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January 3, 2012

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Bob Kelly

SD Chapter of the Risk & Insurance Mngt. Society Inc.  
P.O. Box 81244  
San Diego, CA 92138-1244

Dear Friends:

I write to acknowledge the gift of \$500.00 from SD Chapter of the Risk & Insurance Mngt. Society Inc. to The San Diego Foundation, which was received on December 23, 2011. This amount has been added to the **San Diego Project Heart Beat/Ron McElliott Memorial Fund** at The San Diego Foundation.

In accordance with the IRS Code for acknowledgment of charitable contributions, this letter serves as your receipt. We have provided no goods or services in consideration for your gift, and we have exclusive legal control over the contributed assets.

Thank you for being a part of The San Diego Foundation.

Warm regards,

Adrienne D. Vargas

VP, Charitable Giving &amp; Donor Relations

P.S. Please keep this letter with your tax records. Our tax identification number is 95-2942582.

Main: 2508 Historic Decatur Rd., Ste. 200, San Diego, CA 92106 | T (619) 235-2300 | F (619) 239-1710  
North County Offices in Rancho Bernardo and Carlsbad | [www.sdfoundation.org](http://www.sdfoundation.org)



Confirmed in Compliance with National Standards for U.S. Community Foundations

# WHAT HAPPENS AT THE RETREAT... caught on camera!



Left to Right: Deborah Luthi, Joe Mazza, Liz Zepeda, George Ward, Kim Pinkerton, Melissa Losasso, Rich Johanson, Lyn Hall, Claire Andersen, and BriAnne Purdy



# Beautiful Catalina Island

RIMS Professional Development

# LEARN RISK

Resources | Networking | Opportunities

**Attend the upcoming RIMS professional development workshop in San Diego!**

## **Developing a Risk Management Program for Your Organization**

February 22-23

- Create communication strategies and a risk management framework that aligns with goals and sets roles and responsibilities.

## **Risk Analysis Forecasting Tools\***

March 26-27

- Quantify the potential impact of losses and apply analytical methods and software tools to better understand your risks and enhance decision making.

## **Enterprise-Wide Risk Management: Developing and Implementing\***

July 9-11

- Apply ERM strategies, tools, case studies and exercises to build an ERM plan.

## **Risk Assessment Methods\* (2012 Launch)**

September 20-21

- Apply and communicate relevant risk assessment methodology based on ISO 31010 to match risks and opportunities to company objectives.

**Register Now!** [www.RIMS.org/EducationWorkshops](http://www.RIMS.org/EducationWorkshops)



\*A RIMS Fellow® Workshop. Acquire advance expertise in risk management, and add the RF designation to your credentials. For more information and to enroll, visit [www.RIMS.org/AboutRF](http://www.RIMS.org/AboutRF).

Browse all upcoming RIMS workshops at [www.RIMS.org/Workshoplist](http://www.RIMS.org/Workshoplist)