



Fostering Learning & Leading with PRISM's

# PASS THE BATON

MENTORSHIP PROGRAM FOR PUBLIC ENTITIES

JANUARY 2024



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BY AREA OF EXPERTISE (**MENTOR**) /NEED (**MENTEE**)

	Accounting/ Risk Finance	Claims Management	Human Resources	Information Technology	Risk Control	Risk Management
Amanda Phillips					X	X
Anna Kho	X	X			X	X
Beth Lyons	X	X	X	X	X	X
Craig Schweikhard		X				X
Helaina Wilkinson			X	X		X
Hugo Aceves					X	X
Jamelle Peck		X				
Jason Claunch			X			
Jeffrey Hunter	X				X	X
Jiles Smith		X	X		X	X
Lisa Namnath		X			X	X
Marco Sandoval	X	X			X	X
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Naela Cansino		X				
Nathan Black	X	X				X
Pat Flaherty		X			X	X
Rasheedah Johnson					X	X
Robert Romero					X	X
Sara Born					X	X
Samuel English						X
Scott Mann	X	X	X		X	X
Steve Wilmes					X	X
Sarah Poots					X	X
Sarah Olson			X		X	X
Joshua Mizrahi	X	X	X	X	X	X
Steve Wood				X	X	X
Tom Ledda					X	X
Tom Phillips		X				

# Introducing...Anna

**Anna is currently** the Management Analyst for a City in Northern California. She manages and processes all G/L tort claims, subrogation claims and routes them to the TPA as needed. She works closely with the Finance Department for the City's self-insurance, budget and Workers' Compensation/General Liability audits. She also manages facility contracts/franchise agreements, Medicare reporting, unemployment and payroll verification, COIs, and the City's insurance policies. In the near future, she will also be overseeing the training and safety program with HR. She's in a newly created role and it continues to evolve with time.

**Anna is** completely brand new to the field (1.5 years), and she completed CPS HR's Risk Management Practitioner Certificate program, as well as successfully completed her first courses to earn an ARM designation.

**She is interested in PRISM's Mentorship Program because** she is new to the Risk Management industry and would appreciate an expert in the field to whom she can go to seek advice/ask questions to help her be successful in the field.

**She believes that important qualities of a mentor/mentee include** the knowledge/experience and excitement about the field and sharing that same enthusiasm/passion to a newbie.

# ANNA



**Her preferred methods of connecting** are via in-person, email, phone, and Zoom calls.

## **Anna's Education Background**

- Elementary Education
- Biology
- Risk Management Practitioner (RMP) Cert from CPS HR

## **Her Areas of Need Include**

- Accounting/Risk Finance
- Claims Management
- Risk Control
- Risk Management



# MENTEE

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## Introducing...Beth

**Beth currently** oversees operations at PERMA, an all-lines municipal pool with 30 members. She is directly involved in daily operations including Board relations, claim, financial, risk management, and administrative functions.

**Her past experience includes** working with excess, primary, and hybrid pools. She has served as both staff (CJPIA & PERMA) and consultant(Bickmore & Risk Program Administrators) for the past 21 years. Beth obtained her ARM-P as well as her CA broker's license. She has experience working with challenging Boards and difficult financial situations. Beth also worked at a city for several years in the 1990's.

**She is interested in PRISM's Mentorship Program because** she strongly believes in pooling and would like to share the things she has learned during the past 25 years. Additionally, she feels that she will benefit from talking with others that have different experiences and perspectives.

**Beth believes that important qualities of a mentor/mentee include the following:**

For both: willingness to listen, receptive with an ability to think "outside of the box" and/or conceptualize new things.

**Her preferred methods of connecting** are via in-person, email, phone, Zoom calls, and/or at an industry conference.

CLICK TO  
CONNECT WITH  
BETH

# MENTOR

# BETH



### **Beth's Education Background**

- Bachelor of Arts (BA) - Psychology, Math, Spanish
- Associate in Risk Management (ARM) - Public Entity (P)
- CA Brokers' License

### **Her Areas of Expertise Include**

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

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## Introducing...Craig

**Craig currently** works as Executive Director of San Mateo County Schools Insurance Group (SMCSIG), where, for the last 6 years, he is directly involved with managing the full service pool. He is also the current sitting President at CAJPA!

**His past experience includes** 35 years of handling public entity claims at all levels. He has served on both CAJPA and PRISM Legislative Committees.

**He is interested in PRISM's Mentorship Program because** he wants to pass on invaluable industry knowledge and experience.

**Craig believes that important qualities of a mentor/mentee include the following:**  
Being a good coach, and listening.

**His preferred methods of connecting** are via in-person, email, phone, Zoom calls, and/or at an industry conference.

# CRAIG



# MENTOR

### **Craig's Education Background**

- Bachelors of Art, Political Science, California Polytechnic University San Luis Obispo.
- Master of Business Administration (MBA)
- Associates in Risk Management for Public Entities, (ARM-P) completed 2002 & 2013
- IEA –Introduction to Workers' Compensation Claims (WC006)
- Certificate in Legal Principles of Claims Law (American Educational Institute)
- Management and Supervision Certificate from University of California Santa Barbara.
- Praesidium Guardian Certification (Sexual Abuse Training Certificate)

### **His Areas of Expertise Include**

- Claims Management
- Risk Management

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# Introducing...Helaina

**Helaina has been** in risk management/claims for a while now. She is currently a Risk Management Administrator. She oversees Workers' Compensation, DOT-Safety Sensitive, Safety, and COVID.

**Prior to her work with the City**, she worked for a few different agencies:

- Sr. Risk Analyst : Oversaw the following programs (Workers' Compensation, DOT- Safety Sensitive, Safety, Disability Management, Leaves Management, and COVID).
- She also participated contract and insurance renewals for the general liability program.

**She is interested in PRISM's Mentorship Program because** she would love an opportunity to learn from those with more specialized experience in other areas. This will help her continue her development and become more well rounded.

**Helaina is looking for a mentor who** is embodies trust and understanding. A big aspect for her is communication.

**Her preferred methods of connecting** are via in-person.

## **Helaina's Education Background**

- University of Albany, SUNY
- Boston University

## **Her Areas of Need Include**

- Human Resources
- Information Technology

# HELAINA



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HELAINA](#)

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# Introducing...Hugo

**Hugo is currently** is currently a Risk Management Coordinator for a Southern California public agency. He works very closely with the Risk Manager in the day-to-day risk management duties from claims, to risk control, and insurance.

**Prior to his current role**, Hugo was the Risk Manager at Lennox School District for 6 years. His responsibilities revolved around Workers' Compensation, Risk Management trainings, Benefits, and Leaves of Absence management.

**He is interested in PRISM's Mentorship Program because** he wants to gain knowledge from someone with more experience.

**He would appreciate a mentor who** has the following qualities: understanding, patient, and knowledgeable in the industry.

**His preferred methods of connecting** are via in-person, email, phone, and Zoom calls.

# HUGO



## **Hugo's Education Background**

- Associates Degree in Art (AA) - General Studies
- Bachelor of Science (BS) -Business Administration-Management
- CSRSM -Certified School Risk Manager

## **His Areas of Need Include**

- Risk Control
- Risk Management
- Specifically in the following area: staff trainings and COI compliance. His job duties include coordinating staff trainings to increase safety and reduce losses. He would like to learn about different methods/procedures of trainings and which trainings are needed, etc.

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HUGO](#)

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# Introducing...Jamelle

**Jamelle most recently** retired as a Claims Manager for a Southern California city for the past 10 years. Currently, she is acting in a general management consulting role with the Council of Self-Insured Public Agencies (COSIPA).

**Her past experience includes** titles such as: Claims Manager, Assistant Claims Manager, and Special Projects Manager for self-insured public agencies, self-insured employers, and insurance companies. Her experience also includes staff training, RFP preparation and process, and paperless office transitions.

**She is interested in PRISM's Mentorship Program because** she is interested in learning more and staying current in the work comp industry, as well as helping other claim managers to understand and tackle claims issues that she has encountered and conquered.

**She believes that important qualities of a mentor/mentee include** the ability to be a good listener, for both the mentor and mentee. Next to listening, there needs to be a willingness to engage, share, and learn.

**Her preferred methods of connecting** are via in-person, email, phone, at in industry conference, and Zoom calls.

# JAMELLE



# MENTOR

## **Jamelle's Education Background**

- Master of Business Administration (MBA) - Emphasis: Management
- Bachelor of Science (BS) Business Administration - Emphasis: Marketing/Management.
- SIP Certificate
- WCCA Certificate
- Experienced Adjuster Designation - CEU valid through June 2022

## **Her Areas of Expertise Include**

- Claims Management

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# Introducing...Jason

Jason is currently is currently a Risk Management Administrator for a Northern California County. In his role, he oversees claims management, insurance claims, insurance renewals, and all County safety and concerns.

Prior to his current role, Jason was the Assistant Director of HR and oversaw all risk for the County. They determined the County was not devoting enough time and energy to risk management and so his position in HR was eliminated and transferred risk management to County Counsel. He then assumed the title of Risk Management Administrator and assumed all duties.

He is interested in PRISM's Mentorship Program because he wants to expand his knowledge, improve County best practices, and become more comfortable in his position.

He would appreciate a mentor who has a wide range of knowledge in risk and insurance, considering he is relatively new to his position.

His preferred methods of connecting are via in-person, email, phone, and Zoom calls.

# JASON



## Jason's Education Background

- Bachelor of Arts - Criminal Justice & Psychology

## His Areas of Need Include

- Human Resources

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JASON](#)

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# Introducing...Jeffrey

Jeffrey currently works in the HR Department Safety Loss Control Division. His title is the Division Manager from January 14, 2022 to present day. As the Division Manager he plans, organizes, coordinates, and directs the County Safety Loss Control Division. With his responsibilities also include Risk Identification/Assessment, Loss Control - process, and Risk Transfer.

His past experience includes being a Principal Safety Analyst/Assistant/Acting Division Manager, Sr. Risk Analyst, Subrogation Claims Adjuster (Risk Management Division), and a Workers' Compensation Claims Adjuster (Workers' Compensation Division) with the same government entity as his current role. All of these past roles have helped him in insurance contracts, policy, and terminology to succeed in his current role.

He is interested in PRISM's Mentorship Program because he is a teacher at heart and the program provides him with an opportunity to give back to an industry that has given him so much.

He believes that important qualities of a mentor include a platform to give back to those who are coming up/new in the industry.

His preferred methods of connecting are via email, phone, industry conferences and Zoom.

# JEFFREY



## Jeffrey's Education Background

- L.A. City College - General Studies
- Ashworth College - Paralegal
- Chartered Property Casualty Underwriters - Associate in Risk Management (ARM)

## His Areas of Expertise Include

- Accounting/Risk Finance
- Risk Control
- Risk Management



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# Introducing...Jiles

**Jiles currently** consults for a Southern California City where he manages their self-insurance programs, analyzes potential financial exposures, and develops, implements, and monitors their General Liability and Workers' Compensation programs.

**His past experience includes** having been a risk manager for several Southern California public agencies, including several cities and transit agencies. He also served two Governor Administrations as a member of the State of California Workers' Compensation Fraud Assessment Commission. The Commission administered over \$53 million to District Attorneys' and State of California Department of Insurance (CDI) to fight workers' compensation fraud. Additionally, he was on the ASSE Risk Management /Insurance National Advisory Committee (Government Affairs). He has also taught at the University at California, Riverside, covering topics like: Risk Management, Diversity & Inclusion, and Conflict Resolution.

**He is interested in PRISM's Mentorship Program because** he possesses over 30 years in the industry and would like to give back.

**He believes that important qualities of a mentor/mentee include** the ability to be a good listener, is an open and honest communicator, and has relevant expertise or knowledge, all while having the enthusiasm for sharing that expertise.

**His preferred methods of connecting** are via in-person, email, phone, at in industry conference, and Zoom calls.

# JILES



# MENTOR

## Jile's Education Background

- Master of Business Administration (MBA), Risk Management
- Bachelor of Arts (BA) - Sociology

## His Areas of Expertise Include

- Claims Management
- Human Resources
- Risk Control
- Risk Management

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# Introducing...Joshua

**Joshua is currently working** as the Assistant Risk Manager for a county as of January 15th of this year!

**Prior to his current role**, Joshua worked as the office manager for a small business in the live event industry. In the many roles he took on, Risk was one of them. he managed the fleet maintenance, fleet insurance, boom/scissor lift training program, workers compensation policy, workers' compensation claims, general liability policy, liability umbrella policy, and loss prevention.

**He is interested in PRISM's Mentorship Program because** he want to be able to learn and grow in the Risk Management field.

**Joshua considers important qualities of a mentor include** knowledge and experience, someone who won't beat around the bush and tell it how it really is.

**His preferred methods of connecting** are via email, phone, and Zoom calls.

## **Joshua's Education Background**

- Bachelors Degree in Business Administration
- 2 years at Berkeley City College

## **His Areas of Need Include**

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

# JOSHUA



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JOSHUA](#)

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# Introducing...Lisa

**Lisa has been** in Risk Management for 6 years and is the Safety Officer for a South California City. As the City's sole full-time safety professional, her primary duties revolve around safety program management, including policy review and refinement, the Ergonomics and AED Programs, hazard/facility inspections of City property, building a safety culture, and ensuring that the City is compliant with mandated safety training.

**Prior to her current role,** Lisa was a Loss Control Representative for a religious non-profit. There, she learned how to: complete a hazard inspection, solicit buy-in from reluctant stakeholders, write and edit policies, create and hold safety trainings, provide guidance on risk related matters, review contracts, and adjust property losses. Prior to that, when she first graduated from college, Lisa was a claims adjuster and estimator for personal auto claims, commercial auto claims, and total losses.

**She is interested in PRISM's Mentorship Program because** she has been a mentor and has also been mentored several times in her life. She believes that the professional impact and personal growth that comes out of mentorship is one she can't champion enough.

**Lisa considers important qualities of a mentor include** good communication skills, a sense of curiosity, is open, honest, has tact, is conscientious, flexible, and mature.

**Her preferred methods of connecting** are via in-person, email, phone, and Zoom calls.

# LISA



## Lisa's Education Background

- Bachelor of Arts, English
- Associate in Risk Management (ARM)
- Legal Principles Claims Specialist (LPCS)

## Her Areas of Need Include

- Claims Management
- Risk Control
- Risk Management

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LISA](#)

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# Introducing...Marco

**Marco brings** over 30+ years of experience in Risk Management, Insurance, Loss Prevention, and Safety in both the public and private sectors. He currently serves as a Consultant in PRISM's Enterprise Risk Consultants (ERC) Program and has his own consulting firm based in Northern California.

**His past experience includes** being the former Risk Manager for both public entities and private firms.

**He is interested in PRISM's Mentorship Program because** he would like to apply his vast experience in helping to develop new risk management professionals with their career aspirations as well as know that he is playing a major role in the ever developing risk management arena.

**Marco believes that important qualities of a mentor/mentee include** communication, collaboration, consensus and accountability.

**His preferred methods of connecting** are via in-person, email, phone, at in industry conference, and Zoom calls.

# MARCO



# MENTOR

## **Marco's Education Background**

- Bachelor of Arts, Public Administration
- Associate in Risk Management (ARM)
- Leadership in Property Conservation (FM Global) - Loss Prevention Seminar
- CLIMB - Management Development Program
- Member - RIMS, PARMA
- Past Board Member - PRISM

## **His Areas of Expertise Include**

- Accounting/Risk Finance
- Claims Management
- Risk Control
- Risk Management

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# Introducing...Maricela

**Maricela is currently** an HR Analyst for a Southern California City where her primary focus is on recruitment, classification & compensation, performance management, payroll, and special projects. She has limited exposure to claims management, subrogation, and safety.

**Prior to her current role**, Maricela has also been a Sr. Account Clerk and HR Specialist.

**She is interested in PRISM's Mentorship Program because** she wants to help develop a Risk Management program for the City. She feels that without the help of a mentor, learning enough about risk management to be able to develop a program could take a very long time. Also, she wants to make sure that whatever she puts in place is correct, and how better than to learn from industry experts.

**Maricela feels the following are important qualities for a Mentor/Mentee**

**Mentor** - Eager and willing to share their expertise, open and honest, can provide direct feedback.

**Mentee** - Receptive to receiving knowledge and feedback, eager to learn but also to help the mentor in areas they want to learn about.

**Her preferred methods of connecting** are via in-person, email, phone, at an industry conference, and Zoom calls.

# MARICELA



## **Maricela's Education Background**

- Bachelor of Science, Business Administration - Accounting
- Master of Science, Organizational Leadership
- Certified Payroll Professional

## **Her Areas of Need Include**

- Claims Management
- Risk Control
- Risk Finance
- Risk Management

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MARICELA](#)

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# Introducing...Pat

**Pat is currently** the Risk Manager for a Northern California City and brings over 19+ years of experience as a Risk Manager.

**Pat is interested in PRISM's Mentorship Program because** he wants to be available to assist anyone interested in learning more about public agency risk management.

**He believes that important qualities of a mentor include** having a supportive nature and provides quality information to his/her mentee.

**Pat's preferred methods of connecting** are via in-person, email, phone, meet up at an industry conference.

# PAT



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WITH  
PAT](#)

# MENTOR

## Pat's Education Background

- Bachelor of Science, Political Science
- Masters Degree, Public Administration

## Certifications/Designations:

- Chartered Property Casualty Underwriter (CPCU)
- Associate in Risk Management - Public Entity (ARM-P)
- Associate in Claims (AIC)

## His Areas of Expertise Include

- Claims Management
- Risk Control
- Risk Management

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# Introducing...Rasheedah

**Rasheedah has been** in risk management/claims since 2006. She is currently being groomed to promote to the Risk Manager for a Southern California City. She is currently responsible for claims management, policy renewals, leading the Safety Committee, assigning/leading safety trainings, reviewing contracts, creating policies, and updating the City's IIPP.

**Prior to her work with the City,** she worked for a few different agencies:

- a private restaurant chain where she started off as their General Liability and Workers' Compensation Administrator and ended as their Risk Manager
- a Southern California Transit Agency as a General Liability Examiner
- an insurance company as an initial loss adjuster, bodily injury adjuster CIS (partnered with SIU), and Senior Field Adjuster.

**She is interested in PRISM's Mentorship Program because** she plans to become the Risk Manager at the current city with whom she's currently employed and would also like to expand upon her skill set. She considers herself a sponge that is always willing to learn something that is tried and true, but will also stay in touch with the current trend.

**Rasheedah is looking for a mentor who** is honest, candid, provides constructive feedback, is a great listener, non-judgemental, flexible, sees the value in diverse perspectives, has a positive attitude, possesses a willingness to share their skill sets, and has a true passion for risk management.

# RASHEEDAH



**Her preferred methods of connecting** are via in-person, email, phone, at industry conferences, and Zoom calls.

## **Rasheedah's Education Background**

- Bachelor of Science - Sociology
- Certified in Legal Principles for Claims

## **Her Areas of Need Include**

- Risk Control
- Risk Management

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RASHEEDAH](#)

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# Introducing...Razmik

Razmik has been working at the City of Pasadena for over 5 years now. He is currently handling the liability claims that are filed against the City. To add, he also reviews insurance documents that are submitted by vendors for contracts and requisitions.

## Prior to his work with the City,

- Razmik worked as an auto insurance claims adjuster for 12 years.

He is interested in PRISM's Mentorship Program because he wants to become experienced and well rounded in order to plan his next career moves within the industry. He is also looking to grow his network by meeting with people involved in this line of work.

Razmik is looking for a mentor who has good experience in his areas of interest. He wants someone that is responsible and flexible to work around busy schedules. Communication is very important to Razmik and someone who takes accountability.

# RAZMIK



His preferred methods of connecting are via email, phone, and Zoom calls.

## Her Areas of Need Include

- Claims Management
- Risk Management



# MENTEE

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# Introducing...Robert

**Most recently**, Robert's work history includes the following titles and years of experience:

- Safety/Loss Control Manager - School JPA -11 years
- Senior Loss Control Consultant - Private Loss Control Company who works with public agencies - 3 years
- Owner - Desert Risk Solutions - Loss Control Consultant - 1 year

**In the past**, Robert was a(n):

- Operations Manager at a Fortune 500 High Volume Building Products Distribution Company - 23 years
- Director of Risk Management - School District- 1 year
- Risk Management Specialist and Safety and Loss Control Management - 14 years
- Safety/Equipment Trainer - 10 years

**He is interested in PRISM's Mentorship Program because** throughout his work experience, he has always found that gleaning from the experience of others with years of industry knowledge has helped him grow, and better understand how to apply these skills from those that have been there. He would like to offer assistance through what he has experienced in his career.

**He believes that important qualities of a mentor include** having Skills, Knowledge and Experience in both Private and Public sectors, a willingness to share successes, mistakes and lessons learned, and ready to offer advice and share best practices to assist in the success of others.

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WITH  
ROBERT

# MENTOR

# ROBERT



**Robert's preferred methods of connecting** are via email, phone, or Zoom conference.

### His Education Background

- AS - Occupational Safety and Health
- Associate in Risk Management - Public Entity (ARM-P)

### His Areas of Expertise Include

- Risk Control
- Risk Management

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# Introducing...Sara

**Sara is currently** an Assistant Risk Manager at a County and started January of 2024. Her office currently handles all General Liability Claims, Contract Reviews, and Risk Assessments for the County.

**Her past roles include** working at Farmers Insurance as a Liability Claims Manager for over 22 years. Her team consisted of 6 supervisors/leaders, and 36 adjusters/general adjusters. She handled all injury claims, high/low exposure, litigation across California, and coverage interpretation.

**She is interested in PRISM's Mentorship Program because** she was invited to participate in this program and am very interested as I learn to navigate the Public Sector as well as learning the nuances of self-insurance, excess insurance and re-insurance. I am also interested in having a partnership with a mentor that will allow me to explore concepts, ideas and policies from a perspective outside of the County. I believe this will give me more awareness and will aid in me taking on a more global view point when taking all the different facets of risk for a particular situation into consideration.

**Sara is looking for a mentor who** offers open, clear and concise communication, availability, ability to forecast hurdles or next steps the Mentee may face, patience, a desire to help others achieve goals and/or improved skills.

**Her preferred methods of connecting** are via in-person, email, phone, at industry conferences, and Zoom calls.

# SARA



## **Sara's Education Background**

- California State University, Sacramento
- BS: Criminal Justice

## **Her Areas of Need Include**

- Risk Management
- Risk Control

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SARA](#)

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# Introducing...Sarah

**Sarah has been in the role** of a Risk Analyst for a month now. She is in charge of contract insurance requirements, insurance renewals for the County, risk and safety assessments, building walk through for OSHA compliance, ergonomic assessments, development and oversight of a wellness committee, development and oversight of a County-wide safety committee, administration of the county wide learning management system, and policy research/development.

**Her past roles include** working for the County Department of Social Services for 7 years as a Staff Services Analyst and one year as a Supervising Staff Services Analyst. While working as a SSA I oversaw contracts, procurement and safety, as well as other internal program integrity functions.

**She is interested in PRISM's Mentorship Program because** she wants professional development. She wants to obtain feedback and advise. Some other things she hopes to gain are knowledge, personal growth, networking, career advancement, and inspiration/motivation.

**Sarah is looking for a mentor who** has experience, good communication, accessibility, and empathy. To add, she would appreciate someone who is understanding, respectful, honest, patient and shows good commitment.

**Her preferred methods of connecting** are via in-person, email, phone, at industry conferences, and Zoom calls.

# SARAH



## **Sarah's Education Background**

- Bachelors Degree in Arts and Psychology

## **Her Areas of Need Include**

- Risk Management
- Risk Control
- Human Resources

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SARAH](#)

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# Introducing...Samuel

**Samuel is currently** the Legal Risk Specialist for a Southern California City. He has 2+ years of experience in this position. He is handling the same duties as the prior Risk Manager.

**He is interested in PRISM's Mentorship Program because** he feels there is more to learn and he can benefit from the knowledge and years of experience of Risk Managers whom have been in the industry.

**Samuel is looking for a mentor who** can establish a great line of communication and trustworthiness to share and build on past and current technologies of the industry. He is excited for this program because there are a lot new people entering this field and with the help of those that came before him, he and future leaders can continue to grow the field with new ideas and face challenges head on.

**His preferred methods of connecting** are via in-person, email, phone, at industry conferences, and Zoom calls.

# SAMUEL



## Samuel's Education Background

- Bachelor of Arts - Communications
- Certified Paralegal
- Associate in Risk Management (ARM)

## His Areas of Need Include

- Risk Management

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SAMUEL](#)

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# Introducing...Sarah

**Sarah is currently** overseeing workers' compensation, employee benefits, general liability, insurance, and budget. She has been in this role for two years now and works as a small team of three people.

**Her past roles include** work in administration, human resources, and procurement (20 years of government experience).

**She is interested in PRISM's Mentorship Program because** she is still new to risk and there is so much room for improvement in our processes. She is always open to learning new things and developing better practices.

**Sarah is looking for a mentor who** is knowledgeable, resourceful, and experienced. She is searching for someone who can relate to a County with a challenging budget and approximately 1,600 employees.

**Her preferred methods of connecting** are via email, phone, and Zoom calls.

# SARAH



## Sarah's Education Background

- Associates degree in Business Administration

## Her Areas of Need Include

- Risk Management
- Risk Control

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SARAH](#)

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# Introducing...Scott

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

Highlights of Experience include:

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

**He has also been** the Director of Risk Management for 2 different school districts, worked as a Risk Management, Safety, and Loss Control Consultant for a Southern California City, and was a Director of HR for a private company in Southern California.

**He is interested in PRISM's Mentorship Program because** he believes that we have to train, lead, and select the next generation of Risk Managers.

CLICK  
TO  
CONNECT  
WITH  
SCOTT

# MENTOR

# SCOTT



**Scott believes that important qualities of a mentor/mentee include** having experience, availability, patience, and a willingness to pass on best practices.

**His preferred methods of connecting** are via in-person, email, phone, at in industry conference, and Zoom calls.

## Scott's Education Background

- Doctor of Public Administration (DPA)
- Master of Business Administration
- Bachelor of Business Administration

## Certifications:

- Chief Business Officer (CBO)
- Senior Executives in State & Local Government
- Associate in Risk Management (ARM)
- LinkedIn Profile [Here](#)

## His Areas of Expertise Include

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

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# Introducing...Steve

**Steve is currently** is currently a member of the Risk Control team with a California Risk Sharing Pool. He advises members on all sorts of loss prevention and member services matters, which make up the majority of his duties and responsibilities (3 years).

**Previously**, Steve was an Investigator for multiple tribal gaming agencies where he performed Accident and Criminal Investigations that occurred on tribal properties. He would also operate CCTV camera systems to ensure safety and security of all tribal properties.

**He is interested in PRISM's Mentorship Program because** he is newer (3 yrs) to the industry and wish to meet more seasoned colleagues in order to learn as much as he can.

**Steve believes that Mentors/Mentees alike** need to remain flexible and willing to both teach and be taught.

**His preferred methods of connecting** are via in-person, email, phone, at industry conferences, and Zoom calls.

# STEVE



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STEVE](#)

# MENTEE

## **Steve's Education Background**

- High School Diploma with some college GE
- Certified Safety Management Specialist (CSMS) through the Professional Safety Institute
- Cal/OSHA 30 HR General Industry and Health Certificate

## **His Areas of Need Include**

- Information Technology
- Risk Control
- Risk Management

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# Introducing...Steve

**Steve has** over 20+ years as a Senior Risk Management Professional. Currently, he works as CEO of Wilmes LLC Risk Control Services, which includes Risk Control and Risk Management, including PRISM's Enterprise Risk Consultants (ERC) Program.

**His past experience includes** 5+ years as Principal Risk Consultant at Alliance of Schools for Cooperative Insurance Programs (ASCIP), as well as a storied career in Risk Management, Safety Management, Loss Control, and Claims in the private sector.

**He is interested in PRISM's Mentorship Program because** he wants to provide assistance and learning to help the profession grow. Steve wants to ensure good risk management practices are maintained, and we don't lose precious services and educational programs because risk managers are simply avoiding risk.

**Steve believes that important qualities of a mentor/mentee include** willingness to listen, being open to new experiences, broad based education, follow-through, dedication, determination, and willingness to do the hard work.

**Steve's preferred methods of connecting** are in-person, at industry conferences, or via email, phone, and Zoom calls.

# STEVE



## **Steve's Education Background**

- RSSP, CPSI, ARM-P, PHR, SHRM-CP, ASC, B.S.
- University of Missouri, St. Louis, Missouri
- B.S., Criminology and Criminal Justice

## **His Areas of Expertise Include**

- Risk Control
- Risk Management



# MENTOR

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# Introducing...Tom L

Tom has over 40 years experience in identifying organizational risks. In that time, he has designed processes to avoid potential catastrophe to property, personnel, or financial well-being of organizations.

Tom's past role that relates most to mentoring is coaching baseball for 40 years, identifying players' weaknesses and helping them develop new skill sets. Mentoring is coaching.

He is interested in PRISM's Mentorship Program because he is interested in sharing the information that he's gathered over the years to motivated individuals, and help them on their journey.

He believes that important qualities of a mentor/mentee includes the following

- A Mentor needs to show genuine interest in the Mentee.
- A Mentee needs to have a passion for knowledge and a career goal.

Tom's preferred methods of connecting are via phone, industry conferences, and Zoom calls

# TOM



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WITH  
TOM

# MENTOR

## Tom's Background

- Currently he oversees 24 member districts to implement building maintenance programs, disaster response, and the Worker's Compensation program.
- Has brought the key stakeholders together moving SMCSIG into a successful Self Insured Risk Pool.
- 30 years experience of owning, and operating a large plumbing company in California.

## His Areas of Expertise Include

- Risk Control
- Risk Management

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CONTENTS

# Introducing...Tom P

**Tom has** over 35 years experience as a Public Entity Risk Manager, with entities ranging from a Special District, School District, Municipality and County. He has 5 years of experience as a Public Entity Risk Management Consultant with PRISM.

## Tom's past projects include

- establishing Risk Management Programs for two public entities
- set up in-house claims administration programs for Liability and Workers' Compensation
- set up Loss Control Program and was involved in redesign of another

**He is interested in PRISM's Mentorship Program because** he wants to help out future generations who are interested in the Risk Management field thrive in their chosen career path. Tom also believes in giving back to the profession as he has a great passion for helping others.

## He believes that important qualities of a mentor/mentee includes the following

- good listening skills
- caring attitude
- patience
- use the K.I.S.S. method

**Tom's preferred methods of connecting** are via email, phone, and Zoom calls

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CONNECT  
WITH  
TOM

# MENTOR

# TOM



## Tom's Education Background

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

## His Areas of Expertise Include

- Claims Management
- Risk Management

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# Introducing...Kyle

**Kyle is currently** is currently a Sr. Management Analyst for a Southern California City. In his role, he is in charge of all insurance application processes, handling liability claims, subrogation of liability claims for the City, and reviewing insurance for our contracts/vendors/special events. He is also the back up for workers' compensation processing at the City, as well as helping to develop some safety procedures for the City. He's been with the City for 9+ years and has been in the Risk Department for the past 7. In the beginning, he was handling basic insurance review, but has taken on progressively more responsibilities over the past 5 years.

**He is interested in PRISM's Mentorship Program because** he knows there is a lot of information from experienced risk managers out there, and he feels he could definitely benefit from learning from those who have been in the industry. Even though this is a job he "fell" into, he has discovered his passion for risk and he wants to learn as much as he can and be the best he can be. Although he has researched/studied/gained a lot of knowledge in certain areas, he still has a lot of weaknesses in others, and would really appreciate someone who is willing to help him learn.

**He is looking for a mentor who** is willing to not only answer questions, but willing to explain why and how they came to that answer, or can point out some good study materials/classes. While an answer is nice, it doesn't help him develop the skills when faced with a similar issue in the future.

**His preferred methods of connecting** are via email, phone, at an industry conference, and Zoom calls.

CLICK  
TO  
CONNECT  
WITH  
KYLE

# MENTEE

# KYLE



## **Kyle's Education Background**

- Bachelors of Fine Arts - Stage Management
- Risk Management Practitioner (RMP) Certificate Program
- Associate in Risk Management (ARM)

## **His Areas of Need Include**

- Human Resources
- Risk Control/Analysis and Safety
- Risk Management
  - Workers' Compensation

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# Introducing...Mari

**Mari is currently** is currently an Assistant Risk Manager for a Northern California County. She's been in that position for almost two years, handling the following tasks: preparing WC paperwork for insurance carriers; organizing non-mandatory training sessions for County employees; review and process Incident Hazard Reports; conduct safety portion of New Hire Orientations; answer questions and provide guidance to Department Safety Representative; and updating a few policies.

**In the past,** Mari was a paralegal (for 5 years) for the County Counsel's office where she processed and managed claims filed against the County and communications between County and Claims Adjuster. She acted as the County's Small Claims Advisor and department Safety Officer. She reviewed legal documents and contracts for sufficiency prior to attorney's review. She also provided assistance to County employees in correcting common contract construction errors. Also, she spent 16 years in Public Safety as a Communications Dispatcher with two Police Departments.

**She is interested in PRISM's Mentorship Program because** she is new to the field of Risk Management and so is her supervisor. There is minimal practical RM knowledge, expertise or guidance available to her. Having a Mentor would be one of the many ways she could expeditiously increase her knowledge base so that she's better able to address, advise, and counsel the other county departments in health, safety, and risk avoidance. She believes that the more knowledgeable she becomes, the more capable she'll be in keeping the County, its employees, and its residents free from serious harm and liability.

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CONNECT  
WITH  
MARI

# MENTEE

# MARI



**Mari is looking for a mentor who** has knowledge in the field of Risk Management and Safety, who has an openness and willingness to share his/her knowledge and experience. Being forward thinking and progressive are also good traits to have.

**Her preferred methods of connecting** are via in-person, email, phone, and Zoom calls.

## **Mari's Education Background**

- Bachelor of Arts - Psychology
- Bachelor of Arts - French Language
- JD Law - not licensed attorney

## **His Areas of Need Include**

- Claims Management
- Risk Control
- Risk Management

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# Introducing...Naela

**Naela is currently** is currently the Acting Risk Manager for a City. She has over 8 years of professional experience within the Risk Management field.

**In the past,** Naela worked for a County as a Safety Officer and another City as a Risk Analyst.

**She is interested in PRISM's Mentorship Program because** she would like to learn more about the Risk Manager role as a whole and find more creative ways to mitigate risks within a municipality.

**Naela is looking for a mentor who** are open to listening and be able to have patience when explaining various topics and processes to the mentee.

**Her preferred methods of connecting** are via in-person, email, phone, and Zoom calls.

## **Naela's Education Background**

- Bachelor in Public Administration
- Masters in Public Administration

## **Her Areas of Need Include**

- Claims Management

# NAELA



# MENTEE

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# Introducing...Roxanne

Roxanne is currently is currently the Risk Analyst for a California City.

She is interested in PRISM's Mentorship Program because she wants to learn additional information regarding the Risk Analyst Position.

Roxanne is looking for a mentor who possesses excellent communication skills and patience.

Her preferred methods of connecting are via email and phone.

## Roxanne's Education Background

- Currently pursuing her AA

## Her Areas of Need Include

- Risk Control
- Risk Management
- Areas that focus on tasks of her Risk Analyst position

# ROXANNE



STATUS:  
MATCHED  
with  
MENTOR

# MENTEE

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