



Strategic Planning Session
AGENDA

Embassy Suites San Rafael
Santa Rosa Room
101 McInnis Parkway
San Rafael, California 94903
(415) 499-9222

Tuesday, February 5, 2019
9:00 a.m.

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- I. Introduction** – *Debbie Wolfe, President, and Jon Paulsen, Executive Director*
 - II. Financial Overview** – *Nancy Broadhurst, Finance Manager*
 - III. Claims Trends**
 - A. Workers' Compensation – *Sarah Centeno, Workers' Compensation Program Manager*
 - B. Property and Liability – *Kyle McKibbin, Keenan & Associates*
 - IV. Strategic Planning**
 - A. Property and Liability Retention Analysis – *Kyle McKibbin, Keenan & Associates*
 - B. Workers' Compensation Program Structure – *Jon Paulsen, Executive Director*
 - V. Lunch**
 - VI. Emerging Risk and Training Resources**
 - A. Workers' Compensation – *John Paulsen, Executive Director, and Sarah Centeno, Workers' Compensation Program Manager*
 - B. Property and Liability – *Kyle McKibbin and Frank Cardoza, Keenan & Associates*
 - VII. Day's Summary and Closing** – *Debbie Wolfe, President, and Jon Paulsen, Executive Director*