



**BIG IDEAS.
SMALL SETTING.**

PRIMA INSTITUTE 2025

**The Industry's Premier Risk
Management Educational Program**

October 20-24 // Columbus, OH

PRIMA Institute 2025 (PI25) is an innovative educational symposium comprised of fundamental risk management curriculum, outstanding faculty and excellent networking opportunities.

PI25 is aimed at new and seasoned risk management professionals who want to learn more about emerging trends and best practices.



Register at
institute.primacentral.org



ENHANCE YOUR PUBLIC RISK MANAGEMENT SKILLSET AND JOIN YOUR PEERS AT THE 2025 PRIMA INSTITUTE!

PI ATTENDEES ENJOY THE FOLLOWING BENEFITS:



- **100, 200 and 300 Level Sessions**

Sessions that become increasingly rigorous provide an excellent platform for attendees to learn and build their risk management skill set.



- **Educators Who Are Leaders in the Industry**

Instructors are subject matter experts and risk management practitioners who innovative teaching styles to engage and develop attendees.



- **Collaborative Learning**

Classroom instruction with interactive group learning offers attendees an opportunity to flourish in a holistic educational experience. Each day begins with an interactive information exchange with peers.



- **Customized Experience**

Daily themed tracks frame this intense risk management training, allowing participants to attend specific days or focus on select sessions according to their learning needs.



- **Network Outside the Classroom**

Casual networking events allow attendees and faculty members to build valuable professional relationships that reach beyond the classroom.



Register at
institute.primacentral.org



MONDAY, OCTOBER 20

Day One • 100 Series

RISK MANAGEMENT 101

This session will discuss the basic elements of a risk management program. Are you a risk manager? Are you a claims manager? Are you a safety manager? The answer is "Yes" to all three.

Speakers:

Carleen Patterson, ARM, ARM-P, CIC, CRM, Alliant Insurance Services, Inc.
Lori Gray, Prince William County, VA

HOW TO READ & EVALUATE INSURANCE INDUSTRY LOSS RUNS

Insurance industry loss runs are used for different purposes. In this session, we will review the data fields captured on most insurance industry loss runs and discuss the value of this information for different parties supporting your risk management program. We will also share opportunities for applying the information contained in loss runs to improve your safety and risk management efforts and ultimately your total cost of risk.

Speaker: David Weightman, PMA Companies

CERTIFICATES OF INSURANCE

Understanding the simplicity and complexity of certificates of insurance is an art form. This session will break down certificates of insurance as we examine the nuts and bolts of coverage, policy dates and the document as proof of insurance. Also discussed will be the circumstances where certificates are often requested--construction projects, permitting, special events, and professional services, as well as why it's important to take a second look at how those certificates impact the totality of your risk. Other topics include why it's important to make sure your certificate matches the requirements in your contract and ideas on how to track those pesky expiration dates as you bring your project to conclusion.

Speaker: Amy Larson, JD, ARM, City of Bloomington, MN

UNDERSTANDING INSURANCE POLICIES

This session will discuss the basic elements of an insurance policy and how all of the parts work together.

Speaker: Carleen Patterson, ARM, ARM-P, CIC, CRM, Alliant Insurance Services, Inc.

MANAGING RISK THROUGH EFFECTIVE SUPERVISION

As the champions of safety directives and the voice of employee safety concerns, first-line supervisors play a crucial role in risk mitigation and accident prevention. In this session, we will discuss the supervisor's role in creating a culture of safety, the positive impact of effective communication and the importance of motivating your team through constructive leadership while also being a productive manager.

Speaker: Chester Darden, Public Entity Partners

AWARD-WINNING IDEAS AND LESSONS FROM PRIMA PUBLIC RISK MANAGERS OF THE YEAR

This panel of PRIMA's Public Risk Managers of the Year will help every level of risk professional. New risk managers can learn how to establish a solid program and more seasoned risk managers might leave knowing a few new tricks. These experts come from all different types of public risk (city, county, state, schools, special district utility, and air/seaports). They offer implementable strategies with million-dollar impacts. Attendees can learn ways to make risk managers superstars in their organization.

Speakers:

Megan Damato, Esq. Town of Greenwich (CT) and Greenwich Public Schools
Allie Matthews, City of Tucson, AZ (Ret.)
Sean Catanese, County of King, WA
Sherri Adams, ARM, WCCA, City of Kansas City, MO
Lori Gray, Prince William County, VA

TUESDAY, OCTOBER 21

Day Two • 200 Series

THE FUNDAMENTALS OF CONTRACTUAL RISK TRANSFER

Join us for a presentation and interactive discussion on certificates, endorsements, insurance requirements and the general principles of contractual risk transfer. We'll discuss the basics of how these tools can be utilized to transfer a project's liability away from your agency. Topics to be covered include certificates, "additional insureds" and other endorsements, insurance coverages and indemnity clauses. We'll also include real-life scenarios to illustrate how a properly executed risk transfer strategy can impact a claim and what can happen if the wrong approach is taken.

Speaker: Joe Costamagna, Schools Insurance Authority

LOOKING BACK, LOOKING FORWARD: LABOR AND EMPLOYMENT UPDATE

Employers can predict that a change in administration will inevitably bring some changes to the labor and employment landscape and will have to adapt accordingly. This year has been no exception. Employers need to navigate myriad presidential executive orders, drastic changes in the enforcement strategies of state and federal agencies that enforce labor and employment laws, aggressive legislative agendas at all levels, and evolving court decisions. This session will provide an update on labor and employment developments over the past year with a particular emphasis on how these changes impact public employers.

Speakers:

Liani Reeves, Miller Nash LLP
Jess Osborne, Miller Nash LLP

SELF-ADMINISTRATION: PITFALLS AND BENEFITS

A self-administered workers' compensation program can improve financial oversight, enhance employee relations and streamline processes, but it's essential to provide adequate support and training to mitigate potential pitfalls. Balancing independence with guidance can lead to a more effective and beneficial experience for everyone involved.

Speakers:

Matthew Yehling, Midwest Employers Casualty
Glenn Price, Jr., Missouri Intergovernmental Risk
Management Association

GAIN SUPPORT THROUGH IMPACTFUL PRESENTATIONS

Our success is directly related to how well we communicate and our ability to present our ideas. Join in this unexpected journey and be prepared to laugh while you learn. Through video and entertaining interaction, you will understand why you feel anxious when you speak before others and be provided with tools and thoughts to make powerful, clear and concise presentations without a panic attack! Whether we are speaking to employees, to the governing body on insurance renewals or underwriters for better pricing considerations, we all need to be able to communicate with confidence. What if you could do this with "seeming" ease? Imagine if you could motivate your fellow team members to be their own risk manager. How much easier would your job become?

Speaker: Dean Coughenour, Independent Risk Consultant

SAFETY COMMITTEES: BUILDING A SAFETY PLAN

Safety programs are necessary written documents, but safety plans are specific to the work environment and subject to change based on conditions. With the assistance of safety committees, specific work plans can identify both hazards in the workplace and help adapt procedures to not only identify the hazards associated with the task, but provide safety procedures to limit exposure through identification, training, engineering, when possible, and personal protective equipment. Each plan requires evaluation of the work exercise enhanced by the participation of a safety committee based on their unique experience and insights.

Speaker: Dan Hurley, ARM-P, CSP, MS, MPA, Independent Risk Manager

OSHA RECORDKEEPING & REGULATORY REPORTING: A ROADMAP FOR SUCCESS!

In this information-packed session, you will learn how to fulfill OSHA recordkeeping requirements under 29 CFR 1904, for work-related injuries and illnesses with greater accuracy and efficiency. Detailed guidance will be provided regarding OSHA recordkeeping requirements, how to complete the required forms (300 & 300A), including required electronic submissions. Whether you are a beginner or very experienced in OSHA recordkeeping, this multifaceted, interactive session is for you!

Speaker: Julie Waller, Alliant Insurance Services, Inc.

WEDNESDAY, OCTOBER 22

Day Three • 200 Series (cont.)

MENTORING IS NOT A NICE-TO-HAVE

Most workplaces are in flux in 2025 as institutional knowledge retires, internal talent rises to new responsibilities and recruitment casts a wide net for needed replacements. Professional development is important and should be a hybrid model of formal and informal training, considering evolving needs by people and capabilities using technology. However, a low-tech method used by humans throughout history remains key to the process – mentoring. It not only provides education (me start fire, you watch) but also builds relationships, challenges the status quo and creates a common goal. This short session will provide rationale and best practices for purposeful mentoring. It will also include a link to resources for how to be the best mentor, and mentee, possible.

Speaker: Mark Pew, WorkCompCollege.com

CREATING A CULTURE OF CIVILITY

As risk managers in our organizations, we have a responsibility to prevent harassment in the workplace. Studies show us that creating a culture of civility is an effective way to reduce harassment and other forms of discrimination. In this session, we will focus on self-awareness, the importance of embracing inclusion and the power of empathy. These topics will challenge us to consider our role in creating a work environment in which everyone feels safe, included and able to be productive at work.

Speaker: Chester Darden, Public Entity Partners

AWARENESS TO ACTION: CULTURE-DRIVEN RISK MANAGEMENT

In this session, we will explore how organizational culture can drive effective risk management. We will discuss how a culture that prioritizes risk can transform awareness into actionable strategies. Using real-world examples and best practices, you will learn how to bridge the gap between risk awareness and action within your organization, while gaining insights into the importance of leadership, communication and employee engagement in cultivating a culture-driven approach to managing risk.

Speakers:

Matt Simmons, Arthur J. Gallagher & Co.
Michelle Jordan, Clayton County Water Authority

BEHIND THE RISK MANAGEMENT CURTAIN: REAL-WORLD HITS AND MISSES

This session will provide attendees with a candid look into the successes and challenges in the risk management field. Using real-world case studies, the effective strategies and common pitfalls encountered by public sector organizations will be highlighted. Participants will gain valuable insights into the decision-making processes, tools and methodologies that have led to successful results, as well as lessons learned from less favorable outcomes. By analyzing these examples, attendees will be better equipped to enhance their own risk management practices and drive more resilient and informed decision-making within their organizations.

Speaker: Shannon Gunderman, CPCU, ARM, AIS, CWCP, Arthur J. Gallagher & Co.

BUILDING YOUR PROFESSIONAL COMMUNITY

According to John Donne, "No (hu)man is an island." Humanity is indeed interconnected and the "butterfly effect" is not just a theory. A thriving organization, and growing individuals, should lean into that interconnectedness by fostering a culture of community. While some communal growth is organic through immersion, longer-lasting communities define a purpose and devise a strategy. For an organization, it is about networking with people that might not look or think like you but have common aspirations that provide opportunities to improve. This panel will present and seek input from the audience on ways to initiate and maintain these efforts at both the organizational and individual level. The goal is to generate a personalized list of actions that can be done upon returning home and to the office.

Speakers:

Mark Pew, WorkCompCollege.com
Ya'Sheaka Williams, Quintairos, Prieto, Wood & Boyer, P.A.
Bob Wilson, WorkCompCollege.com

PTSD AND WORKERS' COMPENSATION

Dr. Branco will explain the historical evolution of the PTSD diagnosis and how to separate real PTSD cases from other psychiatric diagnoses. He will also elaborate on how to diagnose properly using the right criteria. Dr. Branco will discuss the best treatments and resources available and will end the presentation speaking on long-term management and the future of the diagnosis.

Speaker: Fernando Branco, MD, FAAPM&R, Midwest Employers Casualty

WEIGHING IN ON OZEMPIC

As obesity rates hit record levels, a new class of drugs, including Ozempic, are revolutionizing weight loss and impacting workers' compensation claims. In this presentation, Tina and Geoff analyze the emerging role of Ozempic and related medications in workers' compensation cases. They will examine the potential benefits for recovery, associated risks and cost implications while reviewing case studies highlighting those considerations.

Speakers:

Geoff Jones, Esq., Midwest Employers Casualty
Tina D'Andrea, Midwest Employers Casualty

THURSDAY, OCTOBER 23

Day Four • 300 Series

RISK MANAGEMENT PROBLEM SOLVING

Attendees will be organized into groups to collaborate and collectively brainstorm to solve a risk management issue.

BUILDING SAFER WORKPLACES: STRATEGIES TO END ABUSE AND FOSTER PSYCHOLOGICAL SAFETY

Workplace abuse, whether emotional, psychological or physical, has far-reaching consequences for employees, teams, and organizational success. In this session, we will explore actionable strategies to identify, address and prevent workplace abuse while fostering a culture of psychological safety. Drawing on real world examples, research-backed insights, and best practices, this presentation will equip attendees with the tools to create environments where employees feel respected, valued and empowered to speak up.

Speaker: Kimberly Williams, Walker Advertising

THE ESSENTIAL ELEMENTS OF EFFECTIVE COMMUNICATION

Though we begin communicating the moment we're born, most adults would have to admit, our communication skills could still use some improvement. Often, the problems begin with the fact that we never mastered (or we became complacent and abandoned) many of the fundamentals of effective communication. These small habits and/or disciplines contribute greatly to other people's perception of you both personally and professionally. This presentation delivers simple but important mechanics and tools to help you to become a better communicator, which will increase your influence with others.

Speaker: Randy Anderson, CSP, e3 Professional Trainers

ERM CASE STUDY: KING COUNTY, WASHINGTON

This session will explore how King County's Enterprise Risk Management (ERM) program built and sustains its innovative approach to managing risk across a large, complex organization. Participants will learn how King County developed and implemented its ERM framework to proactively identify, assess and mitigate risks in areas ranging from natural disasters to operational challenges. The session will highlight collaborative work between departments, use of technology for risk data collection, and strategies for embedding risk management practices into decision-making. Attendees will gain valuable insights into King County's practical applications, successes, and challenges, offering actionable strategies to implement or enhance ERM programs in their own organizations.

Speaker: Sean Catanese, King County, WA

CLAIMS INVESTIGATIONS AND ROOT CAUSE ANALYSIS

This presentation covers two critical aspects of claims management: claims investigation and root cause analysis (RCA). It provides an in-depth look at how investigations are conducted to verify claims and determine liability, as well as how RCA is used to identify the underlying causes of claims trends, fraud or recurring issues.

Speaker: Ya'Sheaka Williams, Quintairos, Prieto, Wood & Boyer, P.A.

LEGAL LIABILITY IN RISK MANAGEMENT

The speaker will discuss different theories of legal liability as well as ideas and best practices to avoid or mitigate exposure in public entities. Topics to be covered will include negligence; constitutional violations, including excessive use of force; discrimination; and training and hiring, to name a few.

Speaker: Amy Larson, JD, ARM, City of Bloomington, MN

CYBER RISK AND RESILIENCE: OPTIMIZING YOUR CYBER INSURANCE PARTNERSHIPS

Cyber insurance isn't just about securing the right coverage - it's about having a team of specialists to guide you through a cyber event, ensuring you're prepared and supported every step of the way. In 2025, strong partnerships with cyber insurance brokers, insurers and vendors are more critical than ever. This presentation will focus on how to optimize these partnerships to implement best practices and enhance cyber resilience and risk management. Leaning on these partnerships is critical to implementing strategies for optimizing policy renewals, managing claims and working closely with brokers and insurers to address evolving threats. Discover how to turn your cyber insurance partnerships into a strategic advantage, ensuring your organization is well-prepared for the challenges of today and tomorrow.

Speakers:

Rick Pray, Alliant Insurance Services, Inc.
Courtney Ramirez, Alliant Insurance Services, Inc.

FRIDAY, OCTOBER 24

Day Five • 300 Series (cont.)

THE FUTURE IS TODAY: RISK MANAGEMENT AND EMERGING TECHNOLOGY

Risk managers have always been on the front lines in innovative approaches to risk management. One thing has remained a priority above all others during that storied history: the commitment to prepare risk managers for today and tomorrow. This priority is especially important as emerging technology becomes more integrated into our society. What role will risk managers members play, not only in the United States, but in our global community, with regards to developing, governing, and utilizing emerging technology risk management approaches for the greater good?

Speaker:

Kelvin Coleman, Route 2 Strategies

USING GENERATIVE AI TO ENHANCE RISK MANAGEMENT

Join us in envisioning a future where AI and human expertise unite for efficient resolution of challenges encountered in risk management. This presentation will demystify generative AI, illustrating its role in pattern recognition, decision support and predictive analysis. AI models can analyze years of data to identify nuanced patterns that might be overlooked due to the volume and complexity of information. Generative AI doesn't replace the role of risk management but acts as an "AI assistant," enhancing decision-making capabilities.

Speakers:

Brian Billings, Midwest Employers Casualty
Patty Reinecke, RN, BSN, CCM, MSCC, Midwest Employers Casualty

PROPERTY RISK MANAGEMENT: IMPLEMENTING POSITIVE OUTCOMES

This session serves as a high-level overview of small to large governmental property programs, including risk financial profiles and professional services. Up for discussion will be how much is too much and how much is not enough as it relates to the claims process, premiums, self-insured funds, captives and funding for property losses.

Speaker: Sarah Gregory, State of Tennessee Department of Treasury

RESILIENCY FOR FIRST RESPONDERS

First responders face unique challenges and stressors in their roles, requiring physical and mental resilience. This presentation will focus on empowering first responders to build strong personal resilience by providing practical tools and strategies for managing stress, prioritizing self-care, developing emotional intelligence and cultivating adaptability, enabling them to thrive in their demanding roles despite the unique challenges they face on a regular basis. Participants will explore the importance of self-care, emotional intelligence and adaptability while strengthening their resilience to thrive in their demanding roles.

Speaker: Thomas Bullock, III, Virginia Risk Sharing Association

WE'VE GOT A MONSTER!

This session serves as a deep dive into identifying child predators who are employees. Attendees will be introduced to what Charles County Public Schools learned and what they have done to reduce risk and, hopefully, eliminate predators from the school system.

Speaker: Jason Stoddard, Charles County (MD) Public Schools

STATE OF THE MARKET: EMERGING TRENDS FOR 2026

This presentation will provide perspective on what is emerging as a risk with a focus on risks of most concern to the public sector. The presentation will explore the factors leading to the elevation of this risk as well as the implications for risk control or risk financing solutions.

Speaker: John Chino, ARM-P, ARM-E, CSRM, Arthur J. Gallagher & Co.

For more information,
contact Shaunda Ragland,
PRIMA's Senior Director, Education & Training,
at sragland@primacentral.org
or 703.253.1261.



ATTENDEE INFORMATION

REGISTRATION

REGISTRATION FOR ENTIRE PROGRAM

	Before August 31	After August 31
Member*	\$1,125	\$1,225
Non-member	\$1,625	\$1,725

A LA CARTE PRICING

Can't get away from the office for a full week? Pay a la carte pricing and attend three out of five days, or one day.

- Monday through Wednesday, October 20-22: 100 and 200 series
- Wednesday through Friday, October 22-24: 200 and 300 series

	Three Day Rate		Daily Rate
	Before August 31	After August 31	-
Member*	\$835	\$940	\$420
Non-Member	\$1,085	\$1,189	\$500

*Full-time students will receive the PRIMA member rate, with valid student ID.

Your registration fee includes continental breakfast and lunch daily in addition to the Wednesday networking event.

HOTEL INFORMATION

PRIMA Institute will be held at
Hilton Columbus Downtown
402 North High Street
Columbus, OH, 43215

Special Rate:

\$239 + applicable taxes per night

Book your group rate for PRIMA Institute 2025:

Start Date: Sunday, October 19, 2025

End Date: Saturday, October 25, 2025

Last Day to Book: Thursday, September 18, 2025

NETWORKING AT PI25

Networking is essential to your success as a professional.

Wednesday, October 22 • Social Hour

PI participants will take part in a fun-filled social hour.

SPECIAL ACCOMMODATION REQUEST

Email meetings@primacentral.org with your specific needs or check the appropriate box during the online registration process.

SOCIAL MEDIA

Join your peers in the excitement before, during, or even after #PI25! Connect with your risk management peers and conference attendees through Facebook, X and LinkedIn.



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TODAY!





PRIMA INSTITUTE 2025

October 20–24 // Columbus, OH

SCHEDULE

	Monday–October 20	Tuesday–October 21	Wednesday–October 22	Thursday–October 23	Friday–October 24
PI 25	100 Series	200 Series	200 Series	300 Series	300 Series
8:00 AM–8:30 AM	Welcome	Breakout/Q&A Session	Mentoring is Not a Nice-to-Have Mark Pew	Risk Management – Problem Solving	PRIMA Institute 2026 Planning
8:30 AM–9:30 AM	Risk Mangement 101 Carleen Patterson and Lori Gray	The Fundamentals of Contractual Risk Transfer Joe Costamagna	Creating a Culture of Civility Chester Darden	Building Safer Workplaces: Strategies to End Abuse and Foster Psychological Safety Kimberly Williams	The Future is Today: Risk Management and Emerging Technology Kelvin Coleman
9:30 AM–9:45 AM	Break	Break	Break	Break	Break
9:45 AM–10:45 AM	How to Read & Evaluate Insurance Industry Loss Runs David Weightman	Looking Back, Looking Forward: Labor and Employment Update Jess Osborne and Liani Reeves	Awareness to Action: Culture Driven Risk Management Matt Simmons and Michelle Jordan	The Essential Elements of Effective Communication Randy Anderson	Using Generative AI to Enhance Risk Management Brian Billings and Patty Reinecke
10:45 AM–11:00 AM	Break	Break	Break	Break	Break
11:00 AM–12:00 PM	Certificates of Insurance Amy Larson	Self-Administration: Pitfalls and Benefits Matthew Yehling and Glenn Price, Jr.	Behind the Risk Management Curtain: Real-World Hits and Misses Shannon Gunderman	ERM Case Study: King County, Washington Sean Cantanese	Property Risk Management: Implementing Positive Outcomes Sarah Gregory
12:00 PM–1:00 PM	Lunch	Lunch	Lunch	Lunch	Lunch
1:00 PM–2:00 PM	Understanding Insurance Policies Carleen Patterson	Gain Support Through Impactful Presentations Dean Coughenour	Building Your Professional Community Mark Pew, Bob Wilson, and Ya'Sheaka Williams	Claims Investigation/Root Cause Cause Analysis Yasheaka Williams	Resiliency for First Responders Thomas Bullock
2:00 PM–2:15 PM	Break	Break	Break	Break	Break
2:15 PM–3:15 PM	Managing Risk Through Effective Supervision Chester Darden	Safety Committees: Building a Safety Plan Dan Hurley	PTSD and Workers' Compensation Dr. Fernando Branco	Legal Liability in Risk Management Amy Larson	We've Got a Monster! Jason Stoddard
3:15 PM–3:30 PM	Break	Break	Break	Break	Break
3:30 PM–4:30 PM	Award-Winning Ideas and Lessons from Public Risk Managers of the Year Former Public Risk Managers of the Year	OSHA Recordkeeping & Regulatory Reporting: A Roadmap for Success! Julie Waller	Weighing in on Ozempic Geoff Jones and Tina D'Andrea	Cyber Risk and Resilience: Optimizing Your Cyber Insurance Partnerships Rick Pray and Courtney Ramirez	State of the Market: Emerging Trends for 2026 John Chino