



6.	<b>Discussion Regarding Employment Practices Liability Training</b> <i>The Committee will be asked to discuss employment practices liability training ideas</i>	A	p.21
7.	<b>Discussion Regarding Health Care Reform Consultation</b> <i>The Committee will be asked to discuss the idea of contracting with a third party for Health Care Reform consultation</i>	A	p.22
8.	<b>Discussion Regarding On-Line Training</b> <i>The Committee will be asked to discuss a pilot on-line training program offered through SkillSoft and LawRoom</i>	A	p.23
9.	<b>Discussion and Recommendation for the New MSLCTC Chair for the Term of July 1, 2013 to June 30, 2014</b> <i>The Committee will recommend to the AORMA Chair its nominee for the position of MSLCTC Chair</i>	A	p.24
10.	<b>Review of Auxiliary Service Provider Report</b> <i>The Committee will receive a copy of the Auxiliary Service Provider Report</i>	I	p.25
<b>D.</b>	<b>INFORMATION ITEMS</b>		
1.	<b>Alliant Loss Control – Utilization Report</b>	I	p. 96
2.	<b>TargetSolutions – Utilization Report</b>	I	p. 98
3.	<b>Employers Group – Utilization Report</b>	I	p. 101
4.	<b>FY 12/13 Long Range Action Plan</b>	I	p. 103
5.	<b>2013 CSURMA AORMA Meeting Calendar</b>	I	p. 110
6.	<b>AORMA Committee and Standing Committees - Roster</b>	I	p. 113
<b>E.</b>	<b>ADJOURNMENT</b>		
	<i>The next meeting is scheduled for August 26, 2013 as a teleconference meeting.</i>		

**APPROVAL OF THE AGENDA ORDER**

**ISSUE:** The Committee will be asked to approve the agenda order for today's meeting.

**RECOMMENDATION:** Staff recommends that the Committee approve the agenda as presented.

**FISCAL IMPACT:** None.

**BACKGROUND:** None.

**PUBLICATION:** None.

**ATTACHMENT(S):** None.

**APPROVAL OF MEETING MINUTES – FEBRUARY 4, 2013**

**ISSUE:** The Committee will be asked to review and approve the draft minutes from the February 4, 2013, Members Services, Loss Control and Training Committee meeting.

**RECOMMENDATION:** Staff recommends approving the minutes, with revisions as necessary.

**FISCAL IMPACT:** None.

**BACKGROUND:** None.

**PUBLICATION:** None.

**ATTACHMENT(S):**

- a. Meeting Minutes – February 4, 2013

**MINUTES OF THE CSURMA AORMA  
MEMBER SERVICES, LOSS CONTROL AND TRAINING COMMITTEE  
FEBRUARY 4, 2013**

**TELECONFERENCE MEETING  
11:00 AM**

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**MEMBERS PRESENT**

Dwayne Brummett (Chair), Associated Students, Inc. (Cal Poly San Luis Obispo) - *arrived at 11:40 AM*

Arnecia Bryant, Loker University Student Union (CSU Dominguez Hills)

Peter Neville, Sonoma Student Union Corporation (Sonoma State University) – *left at 12:25 PM*

Dennis Miller, Cal Poly Pomona Foundation, Inc. (Cal Poly Pomona)

**MEMBERS ABSENT**

Kristin Kelly, Student Union of San Jose State University (San Jose State University)

**STAFF, GUESTS AND CONSULTANTS**

Raven Tyson, Associated Students (San Diego State University)

Haleh Minakary, The Cal Poly Pomona Foundation, Inc. (Cal Poly Pomona)

Mimi Long, Alliant Insurance Services, Inc.

Brent Escoubas, Alliant Insurance Services, Inc.

Tevea Him, Alliant Insurance Services, Inc.

**A. CALL TO ORDER**

The meeting was called to order by Peter Neville at 11:10 AM.

**B. PUBLIC COMMENTS**

There were no public comments.

**C. GENERAL ADMINISTRATION**

**C1. Approval of the Agenda Order**

A motion was made to approve the agenda as presented.

**MOTION: Dennis Miller**

**SECOND: Arnecia Bryant**

**MOTION CARRIED**

NAME	AYES	ABSTAIN	NAYS	ABSENT
Dwayne Brummett				<b>X</b>
Dennis Miller	<b>X</b>			
Kristin Kelly				<b>X</b>
Peter Neville	<b>X</b>			
Arnecia Bryant	<b>X</b>			

**C2. Approval of Meeting Minutes – November 5, 2012**

A motion was made to approve the November 5, 2012, MSLCTC meeting minutes with one correction. Dennis Miller abstained on Item C4.

**MOTION: Dennis Miller**  
**SECOND: Arnecia Bryant**

**MOTION CARRIED**

NAME	AYES	ABSTAIN	NAYS	ABSENT
Dwayne Brummett				<b>X</b>
Dennis Miller	<b>X</b>			
Kristin Kelly				<b>X</b>
Peter Neville	<b>X</b>			
Arnecia Bryant	<b>X</b>			

**C3. Review and Approval of AORMA Recommended Facilities Use Agreement**

Mimi Long explained that the MSLCTC approved the AORMA Recommended Facilities Use Agreement and Handbook at its last meeting on November 5, 2012. The Agreement and Handbook were going to be presented to the AORMA Committee at its meeting on December 6, 2012; however, after the November 5<sup>th</sup> meeting, CSURMA’s general counsel Willy Hsu, reviewed the Agreement and Handbook and provided many recommended revisions. Rather than having the AORMA Committee review and approve the additional revisions, this item was brought back to the MSLCTC for approval.

Mimi let the committee know that Willy Hsu’s recommendations were incorporated into the agreement and are shown in blue and Staff’s additional revisions, based on Willy Hsu’s comments, are in green. Willy Hsu’s recommendations were reviewed by Staff (Mimi Long, Daniel Howell and Mike Simmons.)

It was suggested that the Handbook’s conclusion section be moved to the introduction section at the beginning of the Handbook.

A motion was made to recommend approval of the Facilities Use Agreement and Handbook, including the one change mentioned above, to the AROMA Committee.

**MOTION: Dennis Miller**  
**SECOND: Arnechia Bryant**

**MOTION CARRIED**

NAME	AYES	ABSTAIN	NAYS	ABSENT
Dwayne Brummett				<b>X</b>
Dennis Miller	<b>X</b>			
Kristin Kelly				<b>X</b>
Peter Neville	<b>X</b>			
Arnechia Bryant	<b>X</b>			

**C4. Update Regarding the FY 12/13 Risk Reduction Incentive Program**

Brent updated the Committee on the FY 12/13 Risk Reduction Incentive Program recipients. The Cal Poly Pomona Foundation, Inc. used the grant money to help pay for the replacement of an excessively slippery floor. The project has been completed and Staff will process the \$10,000 reimbursement. The University Corporation, CSU Northridge has not determined their grant project yet. Brent will continue to work with them. Brent is helping Cal Poly Corporation implement employee training that can be viewed on a smart phone. The training will be task specific and will not be generic in nature.

**C5. Approval of Policy and Procedure A-6, Risk Reduction Matching Grant Program**

Mimi Long explained that Policy & Procedure A-6 – Risk Reduction Matching Grant Program was created to outline the purpose of the Program and also the procedures to be followed by the MSLCTC and the Members when seeking grants under this Program. The MSLCTC approved a “work plan” to be followed for the first year of the Program, which was not a “matching” grant Program. Policy & Procedure A-6 incorporates much of the “work plan” into the Matching Grant Program. It also specifies how the Members will be reimbursed for their Program expenses.

A motion was made to recommend approval of Policy and Procedure A-6 to the AORMA Committee.

**MOTION: Arnechia Bryant**  
**SECOND: Peter Neville**

**MOTION CARRIED**

NAME	AYES	ABSTAIN	NAYS	ABSENT
Dwayne Brummett	X			
Dennis Miller	X			
Kristin Kelly				X
Peter Neville	X			
Arnecia Bryant	X			

**C6. Review of Workers’ Compensation and Liability Claims Information at 12/31/12 and Determination of Criteria for FY 13/14 Risk Reduction Matching Grant Program**

The Committee reviewed several different loss exhibits in order to determine the loss reduction criteria for FY 13/14. Within the workers’ compensation program, class code 1006 (food service) is still the number one loss leader; the second loss leader is 1007 (manual labor). The Committee agreed that the workers’ compensation loss reduction criteria for FY 13/14 will be class code 1007 – manual labor, with a focus on lifting and carrying, and slip, trip & fall.

Within the liability program, employment practices liability claims are still the number one loss leader. Over the past five years, the total incurred for EPL is \$3,944,841. The total incurred for the next highest cause of loss (slip, trip & fall) is \$826,670. The committee decided the criteria within the liability program should be EPL loss reduction through specialized training. The committee felt that the EPL training needed to address the corporate culture within the auxiliary and should be appropriate for all supervisors. It was agreed that short training modules on a variety of management techniques should be explored. Dennis Miller agreed to work with other CSU Auxiliary HR staff to suggest a list of EPL training modules to create. These ideas will be discussed at the next MSLCTC meeting on June 3, 2013.

The Committee also discussed the idea of creating an AORMA requirement that all supervisors need to complete EPL training if the Auxiliary’s EPL loss ratio goes beyond a particular percentage, or that the Auxiliary may be required to pay a premium surcharge depending on its EPL loss history.

The Committee agreed that the EPL training would be a long-term project and that most likely it would not be available within FY 13/14.

A motion was made to approve the workers’ compensation loss reduction criteria for FY 13/14 as loss reduction within class code 1007 – manual labor, with a focus on lifting & carrying and slip, trip & fall.

**MOTION: Arnecia Bryant**  
**SECOND: Dennis Miller**

**MOTION CARRIED**

NAME	AYES	ABSTAIN	NAYS	ABSENT
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<b>NAME</b>	<b>AYES</b>	<b>ABSTAIN</b>	<b>NAYS</b>	<b>ABSENT</b>
Dwayne Brummett	<b>X</b>			
Dennis Miller	<b>X</b>			
Kristin Kelly				<b>X</b>
Peter Neville				<b>X</b>
Arnecia Bryant	<b>X</b>			

**D. INFORMATION ITEMS**

The following information items were reviewed by the Committee:

- D1. Alliant Loss Control – Utilization Report**
- D2. TargetSolutions – Utilization Report**
- D3. Employers Group – Utilization Report**
- D4. FY 12/13 Long Range Action Plan**
- D5. 2013 CSURMA AORMA Meeting Calendar**
- D6. AORMA Committee and Standing Committees – Roster**

**E. ADJOURNMENT**

The meeting was adjourned at 12:44 PM.

**REVIEW AND APPROVAL OF THE ALLOCATION OF THE  
OPERATING EXPENSES WITHIN THE FY 13/14 MSLCTC BUDGET**

**ISSUE:** The MSLCTC maintains a budget for its annual loss control and training expenses. Attached is the proposed FY 13/14 MSLCTC expense allocation within the approved FY 13/14 CSURMA budget. The Operating Revenues of \$300,844 have already been reviewed and approved by the AORMA Committee, CSURMA EC and CSURMA BOD. At this meeting, the MSLCTC will discuss and approve the allocation of the costs within the MSLCTC budget.

Highlights for FY 13/14:

- *Alliant Loss Control Services* – Brent Escoubas has lowered the cost for the FY 13/14 contract due to his relocation to Northern California. He is hopeful that this move will reduce his overall travel expenses.
- *Minors on Campus and Theater Safety Training* – This is new training proposed and approved by the CSURMA EC. The total cost budgeted for the training is \$110,000. AORMA’s portion of the total is \$15,831. The remainder of the costs is allocated to the campuses.
- *AOA Sponsorship* – After AOUIT was terminated, the AORMA Committee agreed to increase its sponsorship to \$18,000. In the past, AOUIT contributed \$3,000 to AOA annually.
- *Fitting the Pieces Conference* - Historically, a portion of the cost for the Fitting the Pieces Conference was allocated to AORMA. This year, however, a separate line item is included so it appears that it is a new expense.

**RECOMMENDATION:** It is the recommendation of staff that the MSLCTC review and approve the allocation of the Operating Expense Items, making amendments as needed.

**FISCAL IMPACT:** The Total Operating Revenues increased by \$273,125 to \$300,844.

**BACKGROUND:** None.

**PUBLICATION:** None.

**ATTACHMENT(S):**

- a. MSLCTC Budget for FY 13/14

**CSURMA AORMA  
Member Services, Loss Control and Training Committee  
Fiscal Year 2013 - 2014**

<b>Service</b>	<b>FY 12/13</b>	<b>FY 13/14</b>	<b>Difference</b>
<b>Total Operating Revenues:</b>	<b>273,125</b>	<b>300,844</b>	<b>\$27,719</b>
<b>Operating Expenses:</b>			
<b>Loss Control</b>			
<i>Alliant Loss Control Services</i>	90,525	87,000	-\$3,525
<i>Target Safety</i>	80,750	80,750	\$0
<i>Employers Group - HR Services</i>	27,855	27,645	-\$210
<i>Minors on Campus (Praesidium)</i>	-	9,499	\$9,499
<i>Theater Safety (UC)</i>	-	6,332	\$6,332
<b>Workshops and Training</b>			
<i>AOA Sponsorship</i>	15,000	18,000	\$3,000
<i>2013 Fitting the Pieces Conference</i>	-	8,888	\$8,888
Risk Reduction Grant Program	35,000	35,000	\$0
Infrared Testing	5,000	5,000	\$0
Safety Contingency	3,445	-	-\$3,445
Legal Services	450	-	-\$450
<b>Totals Operating Expenses:</b>	<b>258,025</b>	<b>278,114</b>	<b>\$20,089</b>
<b>Remaining Funds:</b>	<b>15,100</b>	<b>22,730</b>	<b>\$7,630</b>

## **REVIEW OF POLICY AND PROCEDURE A-6, RISK REDUCTION MATCHING GRANT PROGRAM**

**ISSUE:** The AORMA Committee reviewed Policy & Procedure A-6 – Risk Reduction Matching Grant Program at its meeting on March 21, 2013. The Committee asked that the Policy & Procedure be revised to include a timeline for the Member to complete the grant project. The following wording was added to the Policy & Procedure:

1. To access funds under the Program, a Member must complete the grant application which will include;
  - a. A description of the proposed risk reduction project
  - b. The [anticipated timeline for completion of the risk reduction project](#).
  - c. An estimate of the total costs for the proposed risk reduction project.
  
2. [The Member will be expected to complete the proposed risk reduction project within the timeline provided within the grant application. The MSLCTC may rescind the grant if the Member has not started, or completed, the risk reduction project within the timeframe proposed.](#)

The AORMA Committee approved the attached version of Policy & Procedure A-6 at its meeting on May 9, 2013.

**RECOMMENDATION:** Policy & Procedure A-6 is presented as information only; no action is being requested.

**FISCAL IMPACT:** The Policy & Procedure specifies that the MSLCTC will recommend a budget amount for this Program on an annual basis. The FY 13/14 CSURMA budget includes \$35,000.

**BACKGROUND:** The Risk Reduction Grant Program was approved for FY 12/13 with a budget of \$35,000. The MSLCTC approved grants of \$10,000 each to go to Cal Poly Corporation, The Cal Poly Pomona Foundation and The University Corporation, CSU Northridge. Cal Poly Corporation is working on developing a training program to be viewed on a smart phone. The Cal Poly Pomona Foundation has replaced an excessively slippery floor.

The University Corporation, CSU Northridge is currently in the process of replacing a floor as well.

**PUBLICATION:** Policy & Procedure A-6 will be sent out to the AORMA Members when the approved Risk Reduction Matching Grant Program application is distributed.

**ATTACHMENT(S):**

- a) Policy & Procedure A-6 – Risk Reduction Matching Grant Program



## CSURMA AORMA

## POLICY AND PROCEDURE NO. A-6

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**SUBJECT:** **RISK REDUCTION MATCHING GRANT  
INCENTIVE PROGRAM**

**ADOPTED:** **MAY 9, 2013**

**EFFECTIVE:** **JULY 1, 2013**

---

### **PURPOSE:**

The Risk Reduction Matching Grant Incentive Program (**Program**) makes funds available to AORMA Members (**Members**) in both the Liability and Workers' Compensation programs. It funds specialized training, safety equipment, physical improvements or any other safety related item that will lead to a documentable reduction in claims costs. The purpose of this type of *matching grant program* is to encourage **Members** to enhance existing risk reduction efforts.

### **POLICY:**

1. Annually, the Member Services, Loss Control and Training Committee (**MSLCTC**) will complete the following activities:
  - a. Propose to the AORMA Committee a budget amount for the **Program**.
  - b. Review the Liability and Workers' Compensation loss information to identify patterns and claims which may be preventable with the (1) purchase, replacement or upgrade of physical property or (2) development of specialized training.
  - c. Identify the focus of the **Program** for the upcoming fiscal year.
  - d. Approve a grant application and a maximum per **Member** grant amount.
  - e. Send out a memo to all **Members** identifying the focus of the **Program** and inviting **Members** to apply for the grant by completing the grant application.
  - f. Along with the Program Administrator, the grant applications will be reviewed, and if found to be appropriate and consistent with the purpose of the **Program** may be approved by the MSLCTC.
2. To access funds under the **Program**, a **Member** must complete the grant application which will include;
  - a. A description of the proposed risk reduction project
  - b. The anticipated timeline for completion of the risk reduction project. An estimate of the total costs for the proposed risk reduction project.
3. The **Member** will be expected to complete the proposed risk reduction project within the timeline provided within the grant application. The MSLCTC may rescind the grant if the

**Member** has not started, or completed, the risk reduction project within the timeframe proposed.

4. Fifty percent (50%) of the **Member's** risk reduction project costs (up to the maximum grant amount approved for that **Member**) will be reimbursed under the **Program**. The **Member** will submit to the MSLCTC the final paid receipt to be used to calculate the **Program** reimbursement amount.
5. After the grant funds are utilized, the **Member** will provide a brief report providing information that will assist the MSLCTC in monitoring this **Program's** effectiveness and the merits of future **Program** funds.
6. The MSLCTC will work with the Grant Recipients to develop benchmarks to evaluate the success of the **Program**. The MSLCTC will also provide guidance to future Grant Recipients based on these historical benchmarks.

**APPROVAL OF THE FY 13/14 RISK REDUCTION MATCHING GRANT  
PROGRAM APPLICATION / COVERLETTER AND THE MAXIMUM  
PER MEMBER GRANT AMOUNT**

**ISSUE:** At today's meeting the MSLCTC will be asked to approve the Risk Reduction Matching Grant Program application, coverletter and maximum per member grant amount for FY 13/14.

**RECOMMENDATION:** Staff recommends that the MSLCTC review and approve the grant application and coverletter, with amendments as necessary. Staff also recommends that the MSLCTC approve the maximum per member grant amount. \$10,000 was approved for FY 12/13.

**FISCAL IMPACT:** \$35,000 is currently in the FY 13/14 CSURMA budget for the Risk Reduction Matching Grant program.

**BACKGROUND:** Policy & Procedure A-6 – Risk Reduction Matching Grant Program specifies that the MSLCTC, annually, will complete the following activities:

- a. Propose to the AORMA Committee a budget amount for the Program - \$35,000 was recommended by the MSLCTC for the FY 13/14 program and was approved by the AORMA Committee in March, 2013 and the EC and BOD in May, 2013.
- b. Review the Liability and Workers' Compensation loss information to identify patterns and claims which may be preventable with the (1) purchase, replacement or upgrade of physical property or (2) development of specialized training – AORMA's losses were reviewed by the MSLCTC at its meeting on February 4, 2013.
- c. Identify the focus of the Program for the upcoming fiscal year – At its meeting on February 4, 2013, the MSLCTC identified the focus of the program for FY 13/14 as EPL training and prevention of workers' compensation losses within class code 1007 – manual labor, with an emphasis on (1) lifting and carrying, and (2) slip, trip and fall.

- d. Approve a grant application and a maximum per Member grant amount – At today's meeting the MSLCTC will be asked to approve the grant application and the maximum per member grant amount.
- e. Send out a memo to all Members identifying the focus of the Program and inviting Members to apply for the grant by completing the grant application – At today's meeting the MSLCTC will be asked to review and approve the proposed grant application coverletter.
- f. Along with the Program Administrator, the grant applications will be reviewed, and if found to be appropriate and consistent with the purpose of the Program may be approved by the MSLCTC – The MSLCTC will review the applications at its meeting on August 26, 2013 and announce the recipients by August 30<sup>th</sup>.

**PUBLICATION:** The Risk Reduction Matching Grant Program application, along with the coverletter and a copy of Policy & Procedure A-6 will be sent out to the AORMA Members in June, 2013.

**ATTACHMENT(S):**

- a) Risk Reduction Matching Grant Program coverletter and application



## **The AORMA Member Services, Loss Control and Training Committee (MSLCTC) invite you to apply for the **\$10,000** AORMA Risk Reduction Matching Grant**

**Application Deadline – Friday, July 26, 2013**

The *AORMA Risk Reduction Matching Grant Incentive Program* makes funds available to AORMA Members to fund specialized training, safety equipment, physical improvements or any other safety related item that will lead to a documentable reduction in claims costs. The purpose of this program is to encourage Members to enhance their existing risk reduction efforts.

Annually, the MSLCTC will establish a focus for Risk Reduction Program. *For FY 13/14, the Program Focus is prevention of workers' compensation losses within Class Code 1007 – Manual Labor, with an emphasis on (1) lifting and carrying, and (2) slip, trip and fall.* The Program Focus will change every year so that all Members are eligible to apply for the Grant.

To access funds under the Risk Reduction Program, you must complete and submit the attached Risk Reduction Matching Grant Incentive Program application. The deadline for completion is **July 26, 2013**.

The MSLCTC will review all of the grant applications and if your project is found to be appropriate and consistent with the Program Focus it may be approved. You will be notified by **August 9, 2013**.

You will be expected to complete the proposed risk reduction project within the timeline provided within your application. The MSLCTC may rescind the grant if your project has not been started, or completed, within the timeframe proposed.

Fifty percent (50%) of your project costs, up to \$10,000, will be reimbursed. When your project is completed, you will be asked to submit to the MSLCTC the final paid receipt which will be used to calculate the reimbursement amount.

After completing your project, the MSLCTC may request a brief report to assist the MSLCTC in monitoring the Program's effectiveness and the merits of future Program funds.

*Please email your completed application to:*

*Mimi Long*

*[mlong@alliant.com](mailto:mlong@alliant.com)*

**RISK REDUCTION MATCHING GRANT INCENTIVE PROGRAM  
FY 13/14 APPLICATION**

**Application Deadline – Friday, July 26, 2013**

**Per Member Grant Amount: \$10,000**

**Name of Auxiliary Organization:**

**Total anticipated costs for the risk reduction project: \$ \_\_\_\_\_**

**Focus for Type of Loss Reduction:**

**Workers' compensation losses within Class Code 1007 – Manual Labor – with emphasis on (1) lifting and carrying, and (2) slip, trip and fall.**

**Description of your proposed risk reduction project:**

**Anticipated start date and completion date of your risk reduction project:**

**Informational attachments (optional):**

*Please email your completed application to Mimi Long*

*[mlong@alliant.com](mailto:mlong@alliant.com)*

**DISCUSSION REGARDING EMPLOYMENT PRACTICES LIABILITY  
TRAINING**

**ISSUE:** The MSLCTC will be asked to discuss the need for Employment Practices Liability (EPL) Training.

**RECOMMENDATION:** Staff recommends that the committee discuss ways to reduce EPL claims.

**FISCAL IMPACT:** To be determined.

**BACKGROUND:** None.

**PUBLICATION:** None at this time.

**ATTACHMENT(S):** None.

**DISCUSSION REGARDING HEALTH CARE REFORM CONSULTATION**

**ISSUE:** The MSLCTC will be asked to discuss the need for health care reform consultation regarding compliance and implementation.

**RECOMMENDATION:** Staff recommends that the committee discuss whether AORMA should enter into a contract with a health care professional for consultation regarding the compliance and implementation issues surrounding the current health care reform.

**FISCAL IMPACT:** To be determined.

**BACKGROUND:** None.

**PUBLICATION:** None at this time.

**ATTACHMENT(S):** None.

**DISCUSSION REGARDING ON-LINE TRAINING**

**ISSUE:** Currently, AORMA has a contract with TargetSolutions for online training. All 23 campuses have now successfully moved over to SkillSoft and LawRoom for all of their online training. It has been suggested that the Auxiliaries may benefit from utilizing the same online training platform as the campuses. SkillSoft and LawRoom have proposed a 50 seats / two month promotional offer for AORMA to review the online training platform for the AORMA members.

**RECOMMENDATION:** Staff recommends that the committee discuss this optional online training platform and suggest which Auxiliaries may be interested in trying out the system for a few months.

**FISCAL IMPACT:** To be determined.

**BACKGROUND:** None.

**PUBLICATION:** None at this time.

**ATTACHMENT(S):** None.

**DISCUSSION AND RECOMMENDATION FOR NEW MSLCTC CHAIR**  
**FOR FY 13/14**

**ISSUE:** Annually, the AORMA Committee Chair will appoint a new Chair of the Member Services, Loss Control and Training Committee (MSLCTC). The Chair of the MSLCTC must also be an AORMA Committee member. Every spring, the membership of the MSLCTC will recommend to the AORMA Committee Chair a nominee for the Chair position. The following MSLCTC member is also on the AORMA Committee and therefore qualified to serve as the MSLCTC Chair:

Dwayne Brummett, Associated Students, Inc., Cal Poly San Luis Obispo

**RECOMMENDATION:** Staff recommends that the Committee members discuss the MSLCTC Chair position and then make a recommendation to the AORMA Committee Chair.

**FISCAL IMPACT:** None.

**BACKGROUND:** None.

**PUBLICATION:** None.

**ATTACHMENT(S):** None.

## **REVIEW OF AUXILIARY SERVICE PROVIDER REPORT**

**ISSUE:** The CSU Systemwide Office of Risk Management sent all AORMA members a Vendor Survey soliciting feedback on a number of service questions and inviting member comments. Attached is the summary of the Vendor Survey.

**RECOMMENDATION:** This is an information only item; no action is recommended at this time.

**FISCAL IMPACT:** None.

**BACKGROUND:** On an annual basis, the CSU Systemwide Office of Risk Management sends to all AORMA members a vendor survey soliciting feedback on a number of service questions and inviting member comments.

**ATTACHMENT(S):**

- a. Summary of the Service Provider Evaluation Report
- b. Service Provider Responses

2012  
California State University Risk Management  
Authority

**CSURMA AORMA Survey**

Prepared by:  
Alexis Naiknimbalkar  
Quality Initiatives  
Office of the Chancellor  
Software: Snap Survey Professional 10  
Report Date: 02/13/2013

## Survey Campus Coordinator Contacts

for survey customization & approval.

	Primary Contact	Additional Contact 1	Additional Contact 2
<b>Name</b>	Rebecca Skidmore	Zachary Gifford	
<b>Phone</b>	(562) 951-4574	(562) 951-4568	
<b>Email</b>	<a href="mailto:rskidmore@calstate.edu">rskidmore@calstate.edu</a>	<a href="mailto:zgifford@calstate.edu">zgifford@calstate.edu</a>	

Date Survey Opened: 01/09/2013  
 Date Reminder Sent: 01/22/2013  
 Date Reminder Sent: 01/28/2013  
 Date Survey Closed: 01/31/2013

## Survey Administration & Analysis

The web-based surveys were conducted using SNAP Survey Professional 10.  
 The survey URL was distributed to the sample group via e-mail.  
 Analysis was performed and reports created using SNAP Survey Professional 10.

## Population and Sample

	Total
Total Population	260
Sample	260
Responses	80
Minimum Response Rate	31%

*Note: The response rates listed above must be considered as minimum values as they assume that all individuals on the campus-provided e-mail list had an opportunity to take the survey. In reality the number of individuals that will have received the e-mail link is lower than the Sample value due incorrect e-mail addresses, blocked e-mail, etc.*

## Sample Description

Individuals that used CSURMA Auxiliary services in 2012.

**Surveys Administered by:** Chancellor's Office

**Survey E-mail Letter Invitation Text:**

Subject: CSURMA/AORMA Survey

Dear Campus Representative:

CSURMA/AORMA is conducting surveys on the performance of the firms that provide service and support to the campuses and auxiliary organizations. Your participation in this survey provides important information for the success of the programs and the improvement of the services provided to CSURMA/AORMA members.

Please complete this electronic survey by **January 31, 2013**, for the service organizations with which you work. To begin the survey, click on the link below and complete the survey online. You will note on the first page that you can choose the vendors with whom you have worked with. For each service provider, there is opportunity to provide additional comments at the end of each section. All answers and comments will be handled in a confidential manner.

Survey link:

[{SurveyLinkAuto}](#)

We appreciate your participation and thank you for your prompt feedback.

If you should have any questions about the survey, please contact Rebecca Skidmore at 562-951-4580.

**Survey E-mail Letter Reminder Text:**

Subject: Reminder: CSURMA/AORMA survey

Dear Campus Representative:

CSURMA/AORMA is conducting surveys on the performance of the firms that provide service and support to the campuses and auxiliary organizations. Your participation in this survey provides important information for the success of the programs and the improvement of the services provided to CSURMA/AORMA members.

Please complete this electronic survey by **January 31, 2013**, for the service organizations with which you work. To begin the survey, click on the link below and complete the survey online. You will note on the first page that you can choose the vendors with whom you have worked with. For each service provider, there is opportunity to provide additional comments at the end of each section. All answers and comments will be handled in a confidential manner.

Survey link:

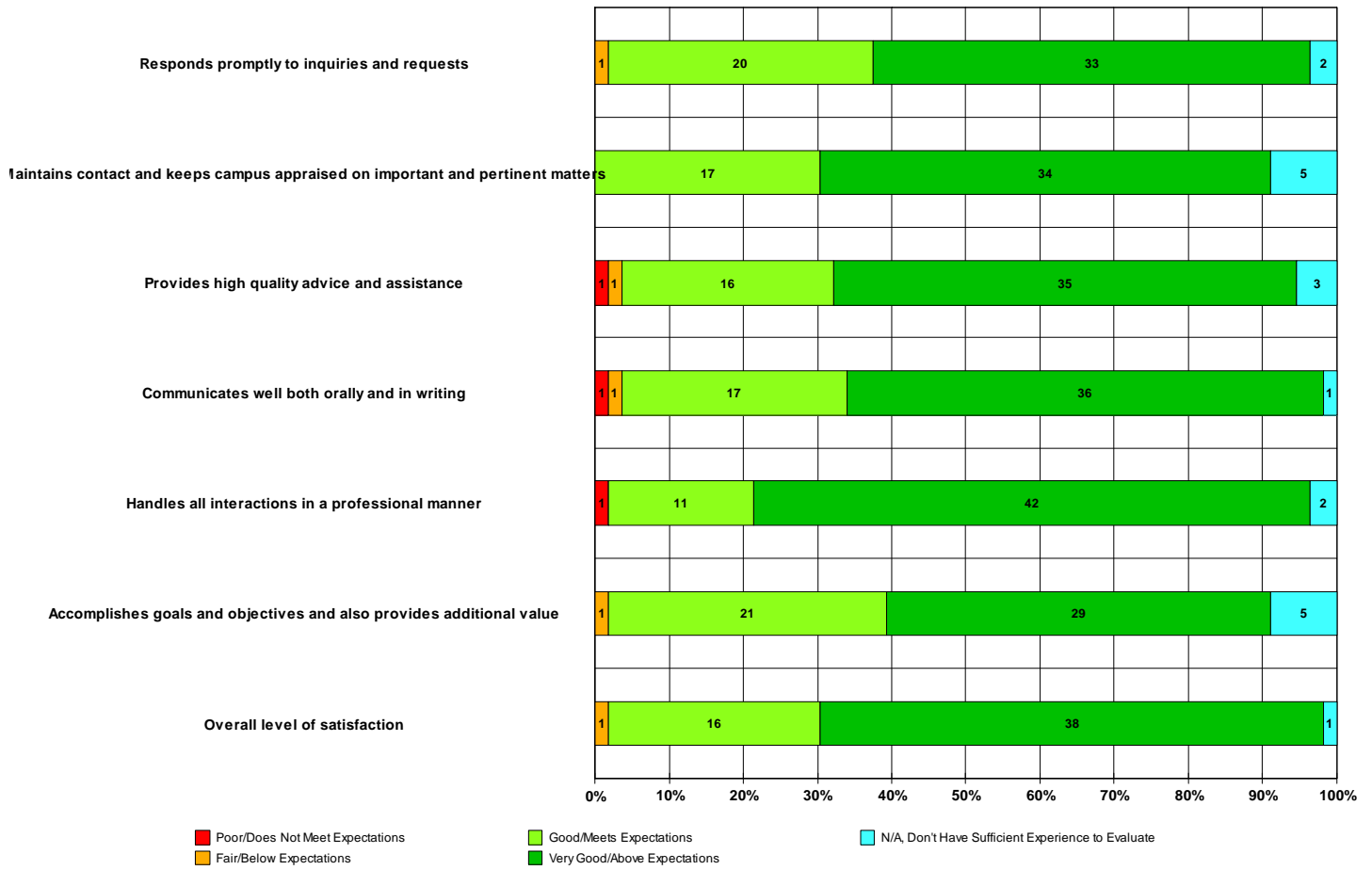
[{SurveyLinkAuto}](#)

We appreciate your participation and thank you for your prompt feedback.

If you should have any questions about the survey, please contact Rebecca Skidmore at 562-951-4580.

# ALL Survey Results

Q3.a to Q3.g Alliant Insurance Services AORMA - Program Administrator



**Please use the space below to provide us with any additio...**

*It's the staff with whom we communicate regularly that really make the difference.*

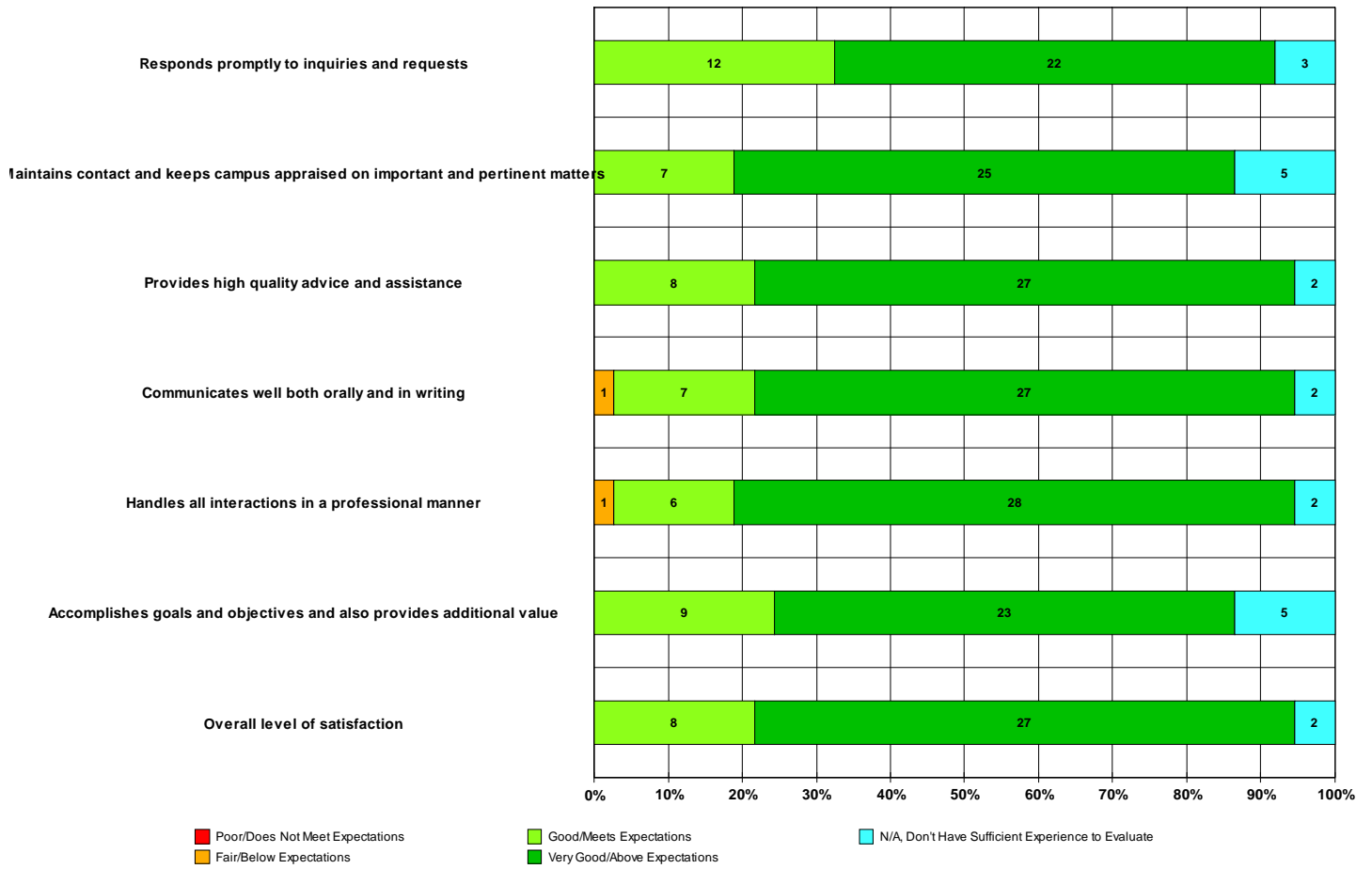
*Dissapointed with ability to report claims data*

*Mimi Long has been most helpful to me this year. I really appreciate having her to consult with and explain things as needed. All of the other staff have been very helpful and responsive as well.*

*they consistently provide a high level of service*

*They always respond promptly to my requests in a timely manner.*

Q5.a to Q5.g Alliant Insurance Services - AORMA Insurance Brokerage/Consulting



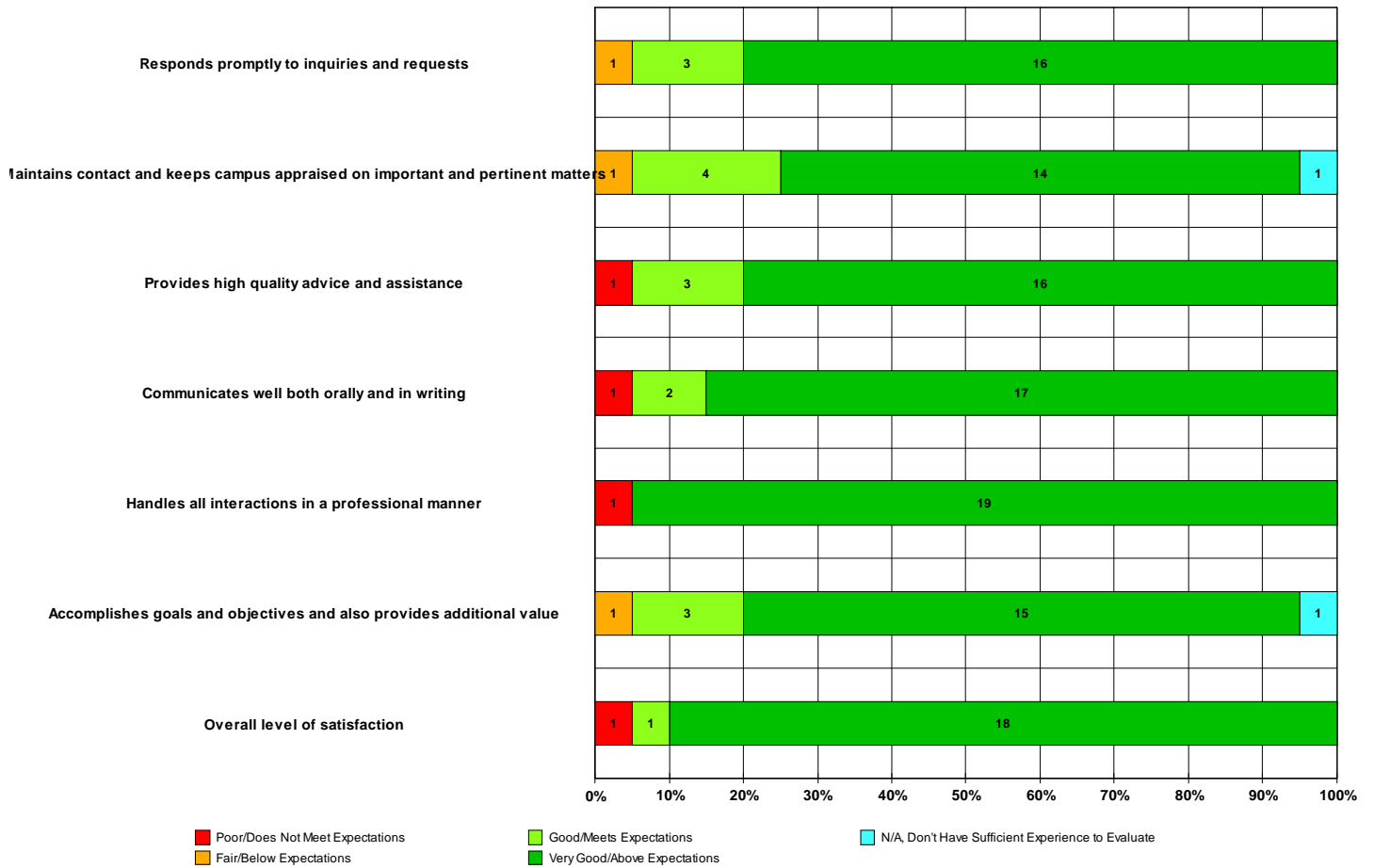
**Please use the space below to provide us with any additio...**

*Was very helpful in finding a creative solution for purchasing workers comp for one employee.*

*Again -- it's the people providing the service.*

*Exceptional service and response to questions or issues related to the CSU San Marcos Foundation insurance coverage. Primarily dealt with Van Rin and Hsan Htein on annual renewals or questions on coverage.*

Q7.a to Q7.g Alliant Loss Control & Safety Services



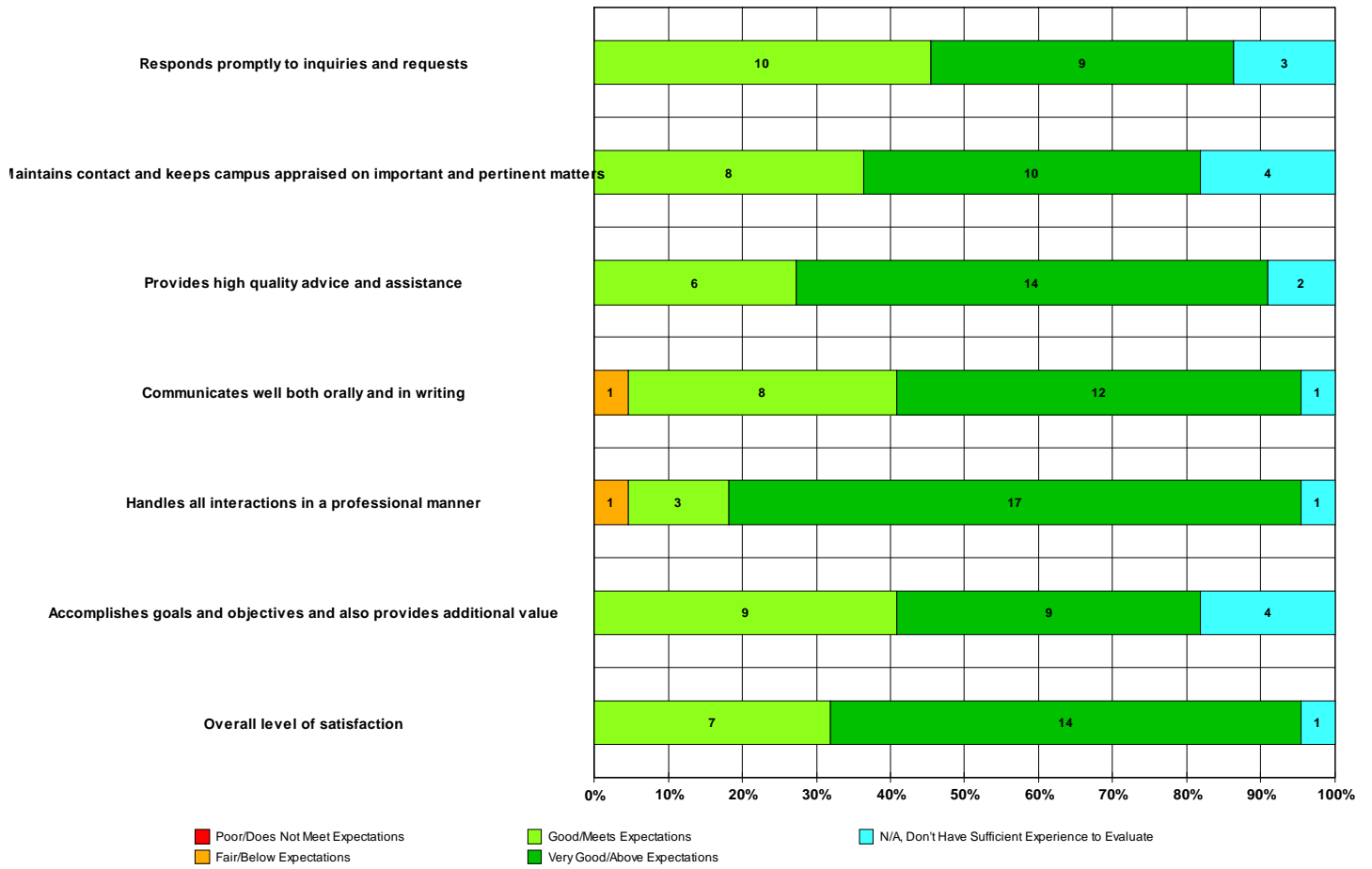
**Please use the space below to provide us with any additio...**

*Brent Escobas has done some work with our campus this year and we were very pleased with his support and work.*

*Brent Escobas is absolutely fantastic. Great resource. His safety guidance and information is invaluable*

*Brent is awesome to work with. He is responsive and always willing to work with the needs of our organization. He's a great asset to Alliant!*

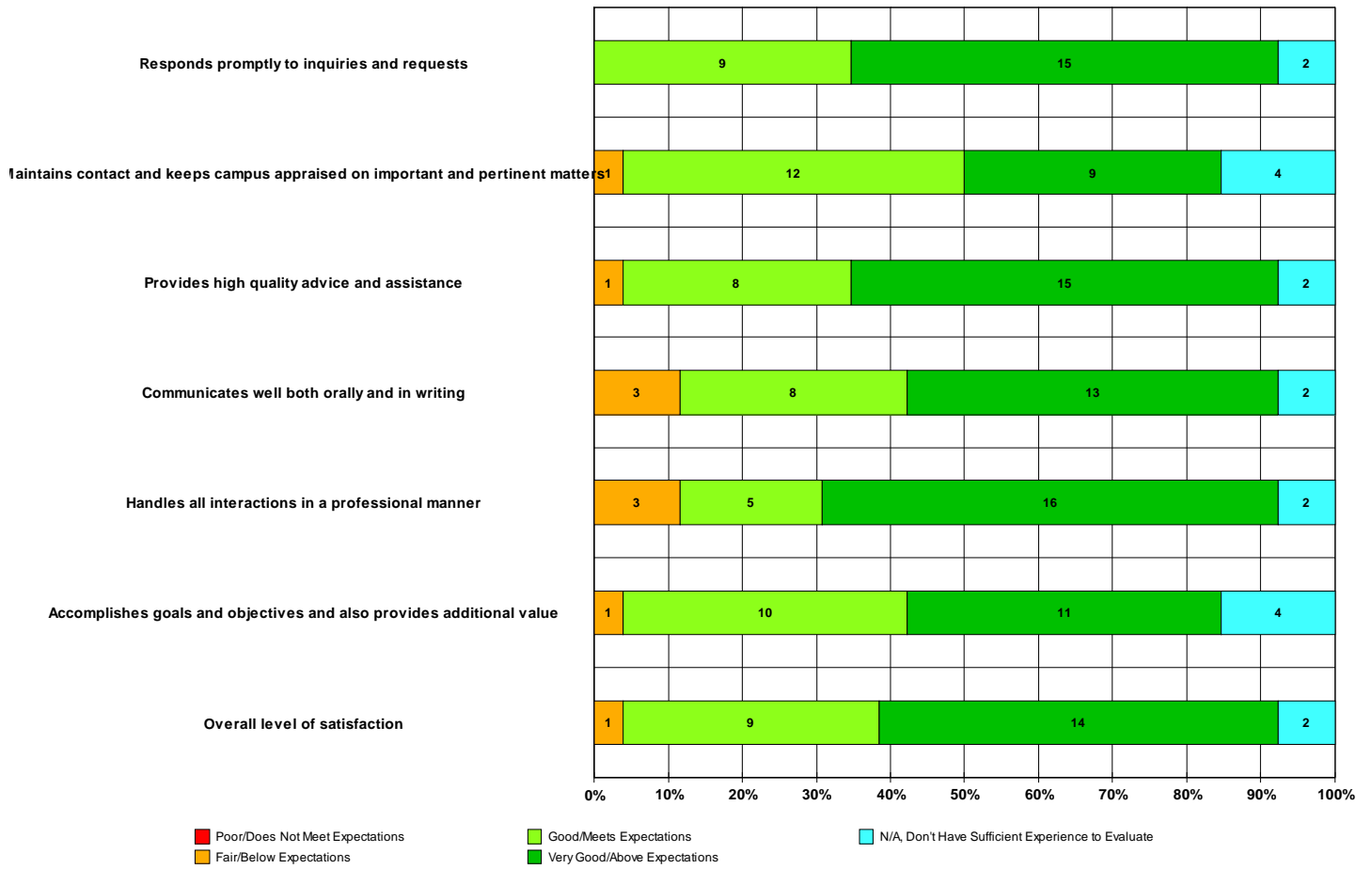
Q9.a to Q9.g Alliant Insurance Services AORMA - Property/Crime Claims Administrator



**Please use the space below to provide us with any additio...**

*It is a pleasure to work with Katie Brandt.*

Q11.a to Q11.g Carl Warren & Co - Liability Claims Administrator



**Please use the space below to provide us with any additio...**

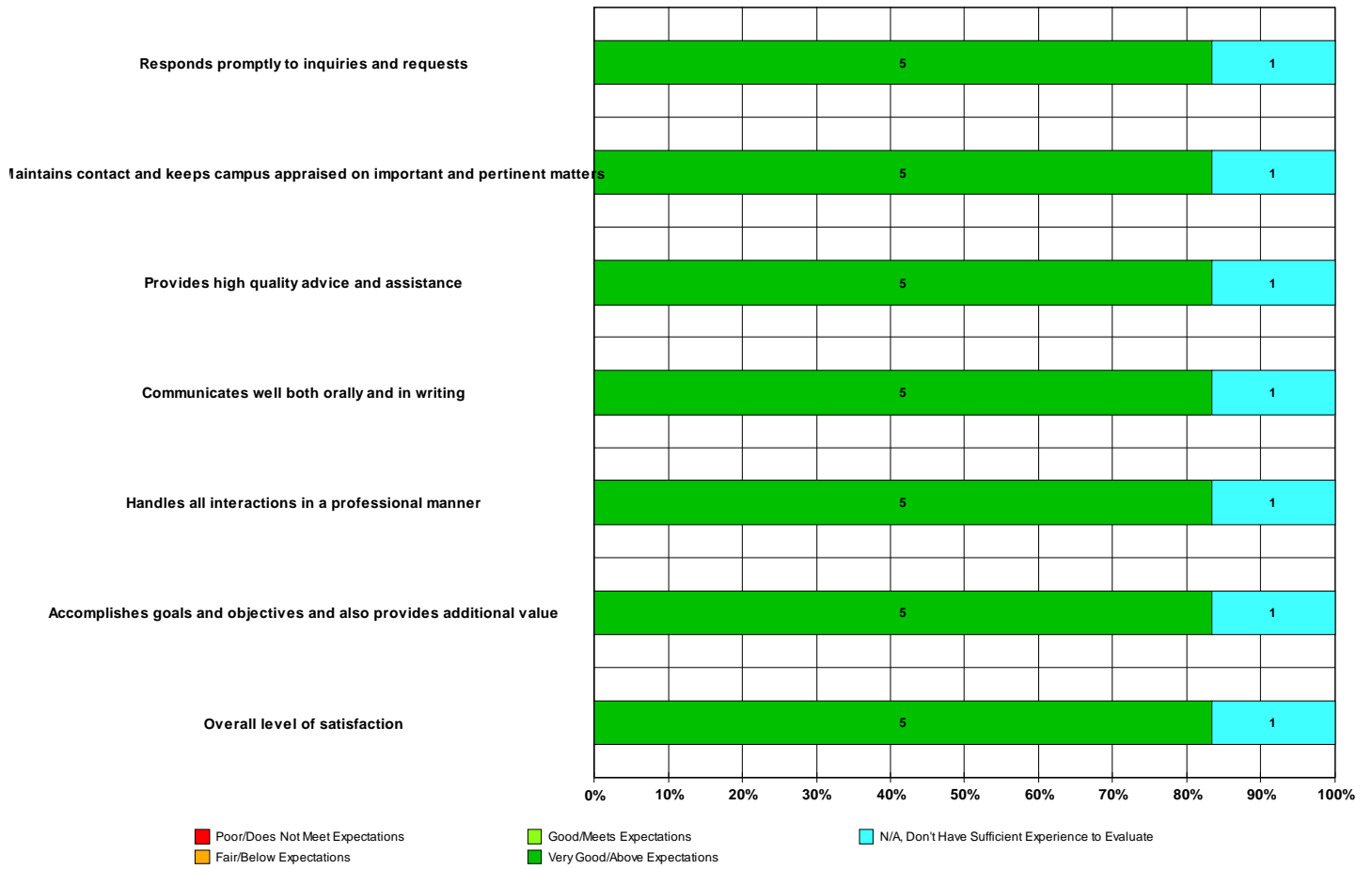
*Sometimes in the whirl of busy schedules, our claim status does not get updated. It would be helpful to know the outcome once Carl Warren is involved instead of my having to ask.*

*Not exactly sure what they do other than process claims*

*My experience has been minimal (thankfully) so I rated them meets. I have not had enough experience to rate them higher. They responded to me timely and forwarded my employee complaint to the attorney without any problems.*

*Jill has be great wit work with. She is very responsive and knowledgeable. The above ratings are based in interactions with Jill.*

Q13.a to Q13.g CO Office of Risk Management - Risk Consulting

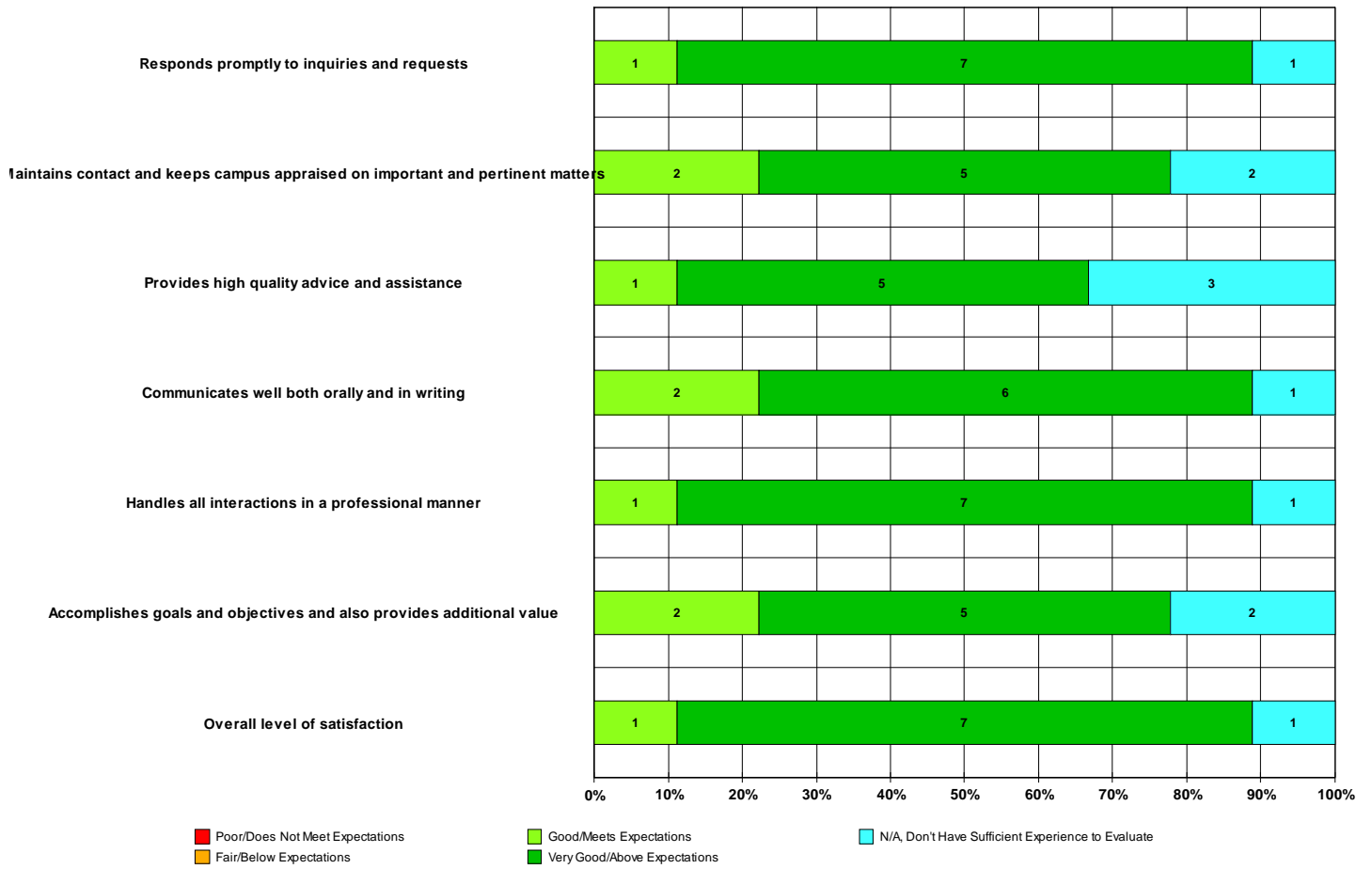


**Please use the space below to provide us with any additio...**

*Both Charlene and Zach are very practical in their assistance and advise.*

*Very accessible and helpful*

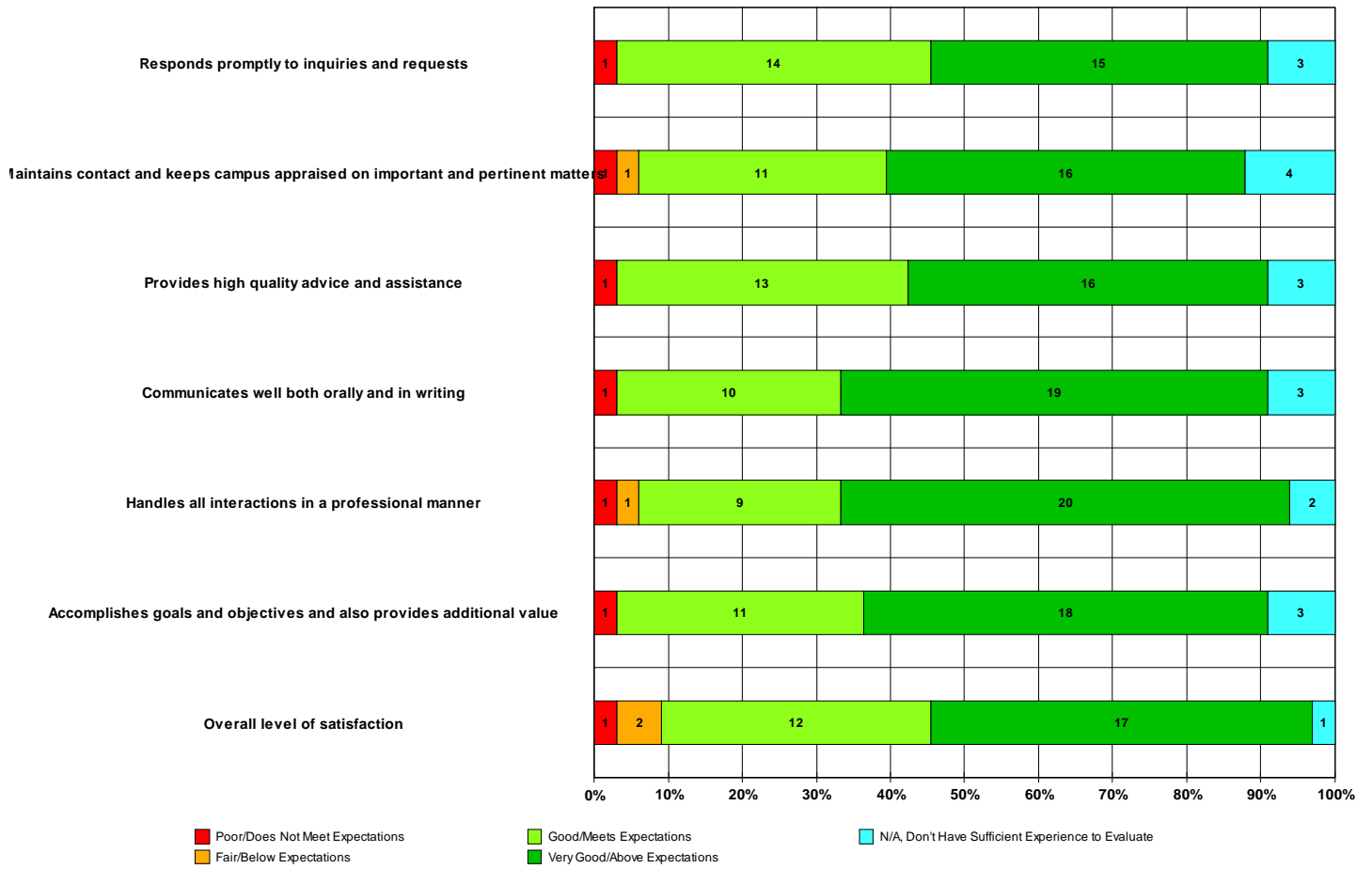
Q15.a to Q15.g CO Enterprise Accounting - Accounting Services



**Please use the space below to provide us with any additio...**

*Only interaction is receipt of dividend check.*

Q17.a to Q17.g Employers Group - HR Consulting Services



**Please use the space below to provide us with any additio...**

*I don't believe they know us well enough to respond quickly. Whenever I call I feel like I have to give too much background information and waste too much time. It isn't that they don't know the law, but the comfort level with them is not there to make me want to deal with them*

*This is an excellent service*

*Their additional services (training, consulting, surveys etc.) are too expensive for our organization.*

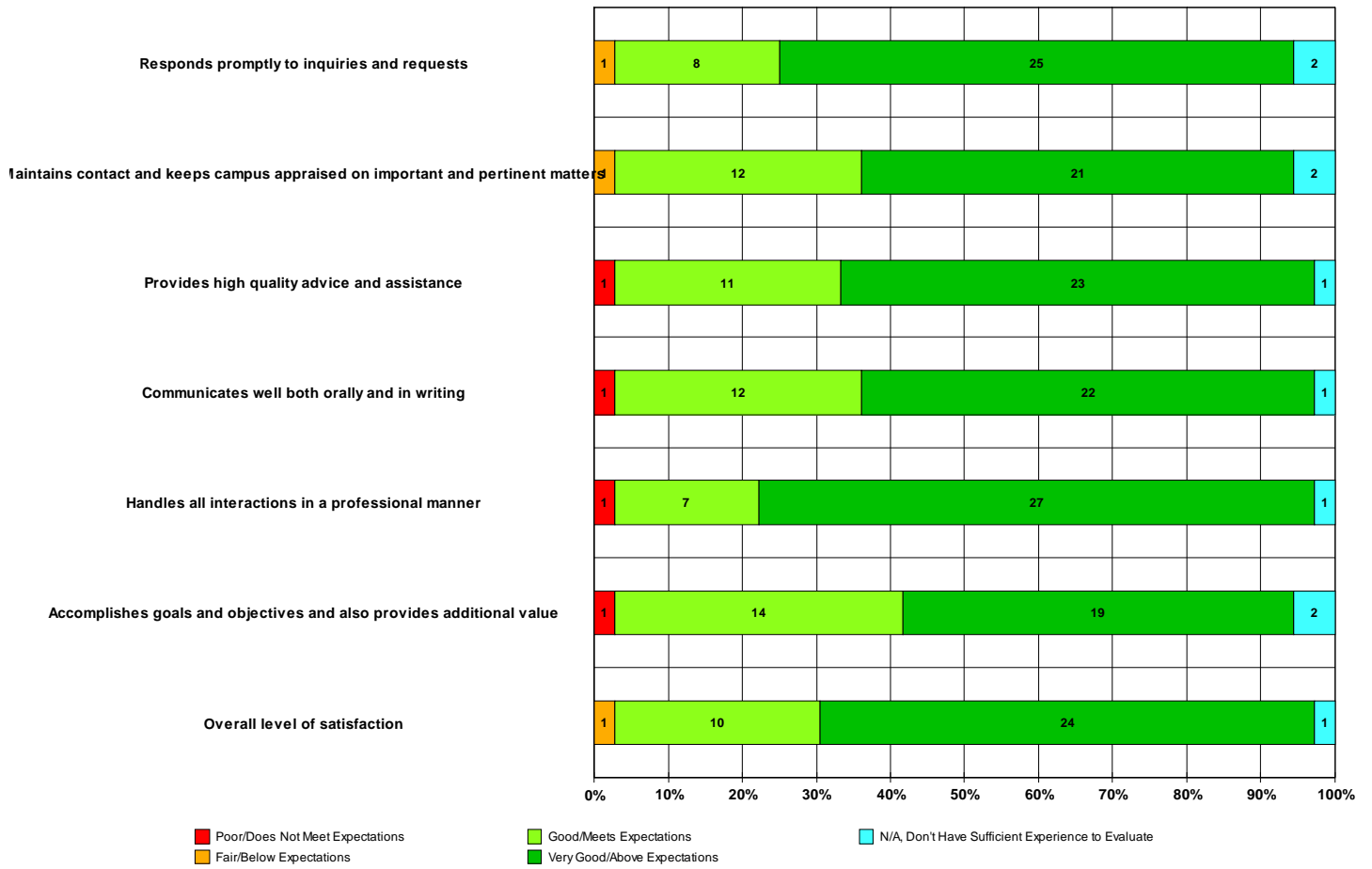
*Love Employers Group. I have worked with them before and I am glad to have them as a resource again. Great services and our rep Bill is always very responsive. Also really like the legal alerts he sends.*

*Employers Group representatives did an exceptional job in "coaching" me through a pregnancy/FMLA leave incident I needed to handle during a vacancy in my HR Manager position. I couldn't have done it without them! They made a very complex process understandable.*

*Employers Group is EXCELLENT!!! Awesome service! Genuine concern for our needs!! Go above and beyond!!!!*

*Very pleased with the service.*

Q19.a to Q19.g Sedgwick CMS - Workers' Compensation Claims Administrator



**Please use the space below to provide us with any additio...**

*Few interactions but good outcomes.*

*Mary Albert does an outstanding job, very proactive, initiates actions. Katherine Brandt needs to learn how to more professionally and tactfully interact with customers and clients. Additionally, her functional expertise is pretty "black and white," there does not appear to be an understanding of gray areas when it comes to resolution of cases.*

*We have a great working relationship with Sedgwick. The staff are great! They even know our studentt assistants on a first name basis and are a pleasure to work with.*

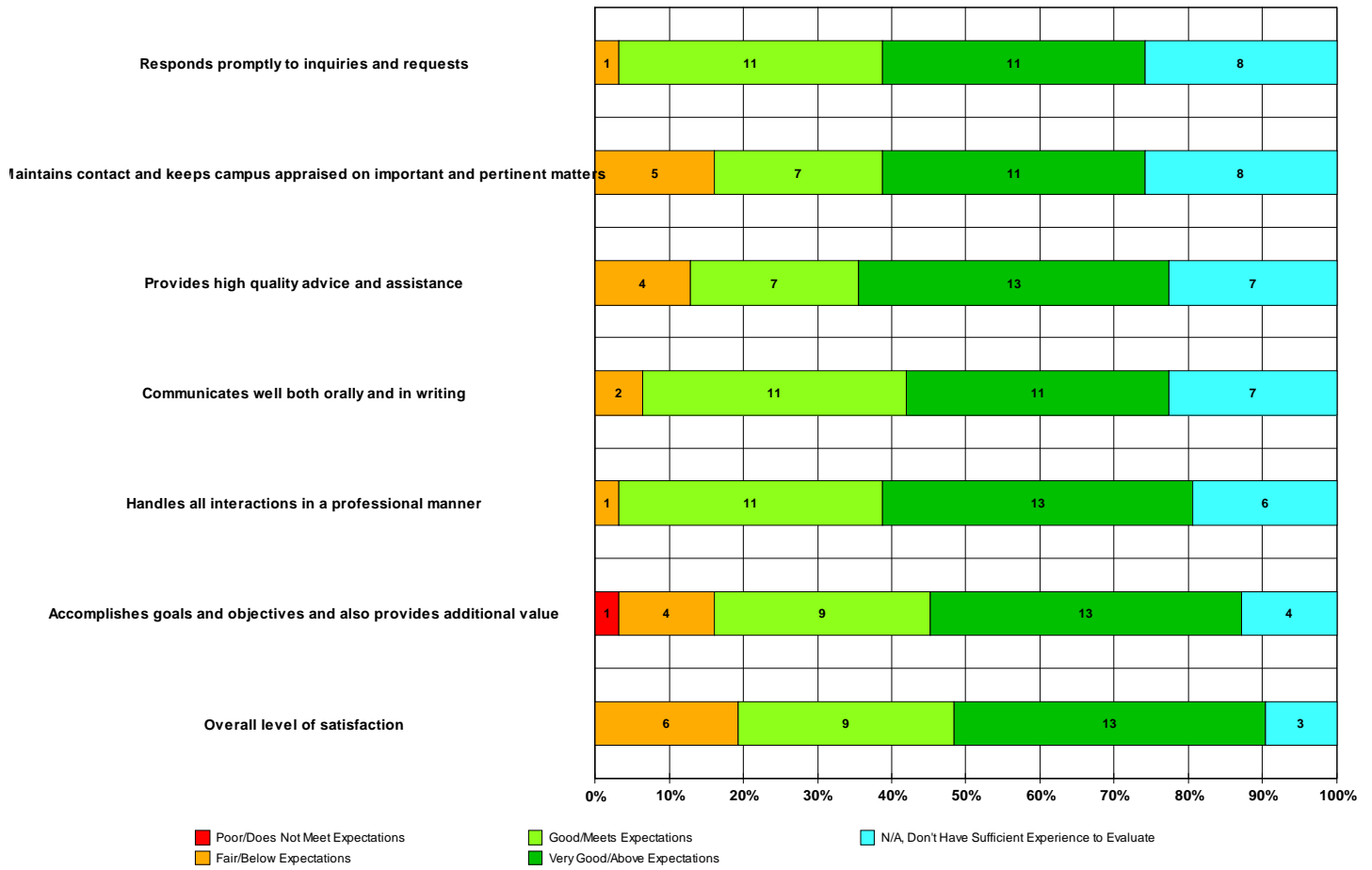
*They've been GREAT!*

*Very helpful to our staff who transitioned into a new role.*

*I have built a good relationship with the adjusters Mary and Katie and think they process works well.*

*I have worked with Target Safety Solutions, Brent Escoubas on our IIPP/Safety Presentations/Safety Inspections, and with Sedgwich representatives. It has been on the safety officer, WCI side not the liability side of the house. I have been very pleased with my service.*

Q21.a to Q21.g Target Safety - Web-based Training



**Please use the space below to provide us with any additio...**

*I have not had any interactions with Target Safety staff, however, I'm not very impressed with the website and its features.*

*I have talked with Target Solutions regarding the online Sexual Harassment training. In my opinion, the online program is poorly organized and presented. Additionally, I personally completed the program, yet the "system" shows me as having only completed half. I discussed this issue several times with our assigned program manager, to no avail, the system MUST BE correct. In talking with colleagues from other auxiliaries, they had the same experience as well. The online Sexual Harassment program provided by our previous vendor was vastly superior to Target Safety's as to content.*

*After so many years it is not acceptable that they have not been able to make simple changes like "being able to customize the email that the messages are sent from" and customize some of the verbal language on their site for the specific campuses. For training purposes we would like some input vs generic information which may not be what we want to convey. Some of the training materials are good. Although we can upload new employee data (or send it to them to upload), the removal is manual which limits some of the large scale training that we want to do.*

*We've had several account manager changes since going live and their styles have been different.*

*Target Safety is a good resource but I admit we have not used it as much as we probably could.*

*TargetSafety is now TargetSolutions. Our TargetSolutions Representative keeps changing. I don't get notified when changes are made to their system which affects notifications that are emailed out to our employees. Our representative never seems to be aware of the change to the notifications and is unable to provide a solution to this on going problem.*

*I am enjoying working with some departments on on-line training. I love it for my department. It works very well with Board members who are not in the office on a regular basis.*

# Copy of the SNAP Professional Survey

# CSURMA / AORMA

## California State University Risk Management Authority

In this survey you will have a chance to evaluate the level of service, communication, professionalism, and responsiveness of the CSURMA / AORMA service providers listed below. All of your responses are confidential. Your candid responses are greatly appreciated and will help us ensure you receive excellent service. To take the survey click on the **Next** button below.






**Please "select" all Vendor/Service Providers that you worked with from January 1, 2012 through December 31, 2012:**

- Alliant Insurance Services** - AORMA Program Administrator
- Alliant Insurance Services** - AORMA Insurance Brokerage/Consulting
- Alliant Loss Control & Safety Services**
- Alliant Insurance Services** - AORMA Property/Crime Claims Administrator
- Carl Warren & Co** - Liability Claims Administrator
- CO Office of Risk Management** - Risk Consulting
- CO Enterprise Accounting** - Accounting Services
- Employers Group** - HR Consulting Services
- Sedgwick CMS** - AORMA Workers' Compensation Claims Administrator
- Target Safety** - Web-based Training

This page refers to your interactions with Alliant Insurance Services - AORMA Program Administrator:

The program administrator for CSURMA/AORMA, providing services including administrative support for the CSURMA Board of Directors, CSURMA Executive Committee, AORMA committees and providing administrative services for self-funded programs.

**Alliant Insurance Services - AORMA Program Administrator:** Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.






	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
Responds promptly to inquiries and requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains contact and keeps campus apprised on important and pertinent matters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provides high quality advice and assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicates well both orally and in writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

This page refers to your interactions with Alliant Insurance Services - AORMA Insurance Brokerage/Consulting:

**Provides broker/consulting services for CSURMA/AORMA purchased insurance.**

**Alliant Insurance Services - AORMA Insurance Brokerage/Consulting:** Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.






	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
Responds promptly to inquiries and requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains contact and keeps campus apprised on important and pertinent matters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

This page refers to your interactions with Alliant Loss Control & Safety Services:

**Provides Loss Control and Safety Services for the Auxiliaries with on-site assessments, safety days, safety webinars, conference training, individual consulting and loss control hot-line.**

**Alliant Loss Control & Safety Services: Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.**






	<i>Poor/Does Not Meet Expectations</i>	<i>Fair/Below Expectations</i>	<i>Good/Meets Expectations</i>	<i>Very Good/Above Expectations</i>	<i>N/A, Don't Have Sufficient Experience to Evaluate</i>
					
Responds promptly to inquiries and requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

This page refers to your interactions with Alliant Insurance Services - AORMA Property/Crime Claims Administrator:

The claims administrator for AORMA providing property and crime claims administrator services.






**Alliant Insurance Services - AORMA Property/Crime Claims Administrator:** Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.

	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
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Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

**The liability claims administrator for the auxiliaries.**






**Carl Warren & Co - Liability Claims Administrator: Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.**

	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
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Communicates well both orally and in writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

**Systemwide coordination and communication of risk and safety matters.**






**CO Office of Risk Management - Risk Consulting:** Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.

	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
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Provides high quality advice and assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
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Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

**Provides A/P, A/R and Accounting services for CSURMA/AORMA.**






**CO Enterprise Accounting - Accounting Services:** Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.

	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
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Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

**Systemwide coordination and communication of risk and safety matters.**

**Employers Group - HR Consulting Services:** Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.






	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
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Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

This page refers to your interactions with **Sedgwick CMS - AORMA Workers' Compensation Claims Administrator:**

**Provides Workers' Compensation claims administration services to the auxiliaries.**

**Sedgwick CMS - AORMA Workers' Compensation Claims Administrator: Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.**






	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
Responds promptly to inquiries and requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains contact and keeps campus appraised on important and pertinent matters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provides high quality advice and assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicates well both orally and in writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

This page refers to your interactions with [Target Safety - Web-based Training:](#)

**Provides workplace employment-law related training for employees and supervisors via a website. Target Safety works with each of CSURMA's auxiliary organizations' point persons to make available reports that contain up-to-the-minute documentation indicating each auxiliary organization, the course started, the course completed, and the dates of same.**

**Target Safety - Web-based Training: Choose the answer that best describes your experience working with this service provider. If you cannot rate an item, or it is not applicable, please select N/A.**

	<i>Poor/Does Not Meet Expectations</i> 	<i>Fair/Below Expectations</i> 	<i>Good/Meets Expectations</i> 	<i>Very Good/Above Expectations</i> 	<i>N/A, Don't Have Sufficient Experience to Evaluate</i> 
Responds promptly to inquiries and requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maintains contact and keeps campus apprised on important and pertinent matters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provides high quality advice and assistance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Communicates well both orally and in writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Handles all interactions in a professional manner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accomplishes goals and objectives and also provides additional value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall level of satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please use the space below to provide us with any additional comments or suggestions:

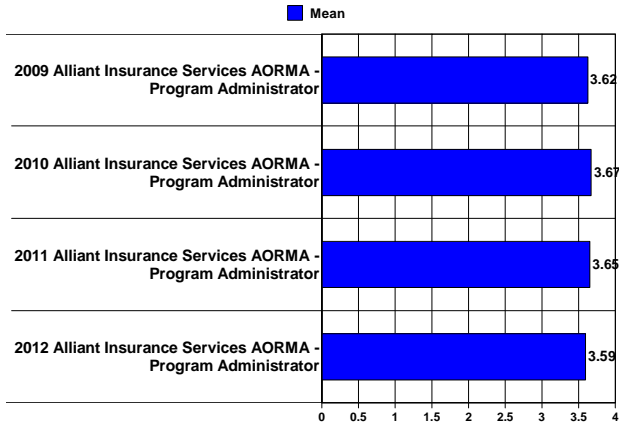
Click the **"Submit"** button below to complete this survey.

Thank you for your feedback.

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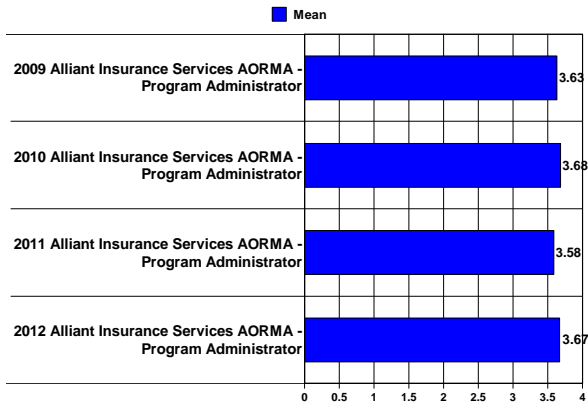
**Responds promptly to inquiries and requests - Alliant Insurance Services AORMA - Program Administrator by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



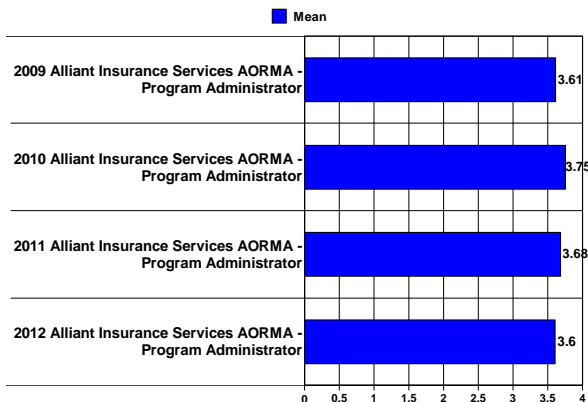
**Maintains contact and keeps campus apprised on important and pertinent matters - Alliant Insurance Services AORMA - Program Administrator by Year**

Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Provides high quality advice and assistance - Alliant Insurance Services AORMA - Program Administrator by Year**

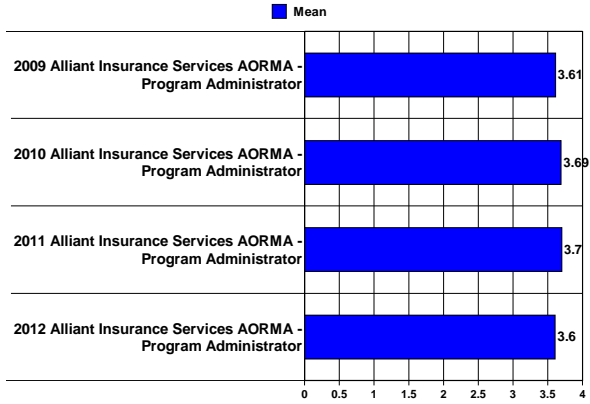
Analysis...: Provides high quality advice and assistance  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

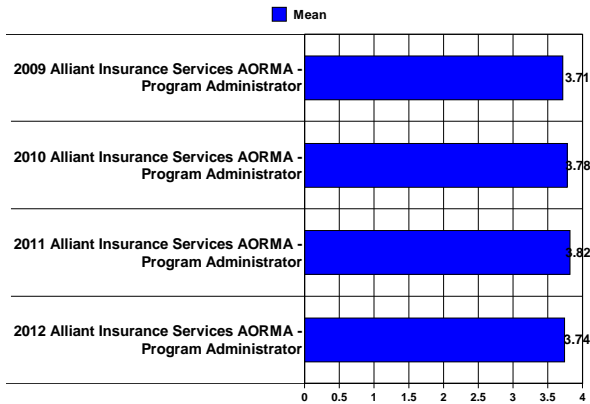
**Communicates well both orally and in writing - Alliant Insurance Services AORMA - Program Administrator by Year**

Analysis...: Communicates well both orally and in writing  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



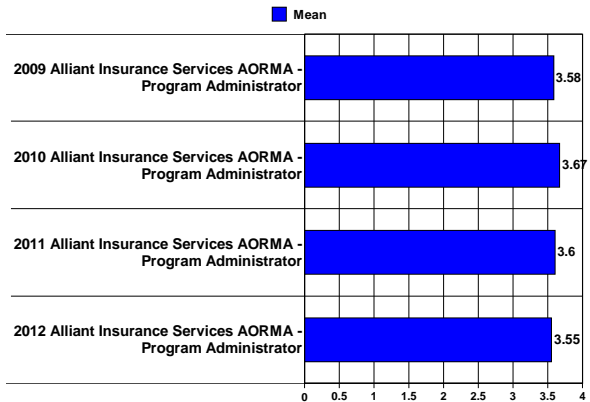
**Handles all interactions in a professional manner - Alliant Insurance Services AORMA - Program Administrator by Year**

Analysis...: Handles all interactions in a professional manner  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Accomplishes goals and objectives and also provides additional value - Alliant Insurance Services AORMA - Program Administrator by Year**

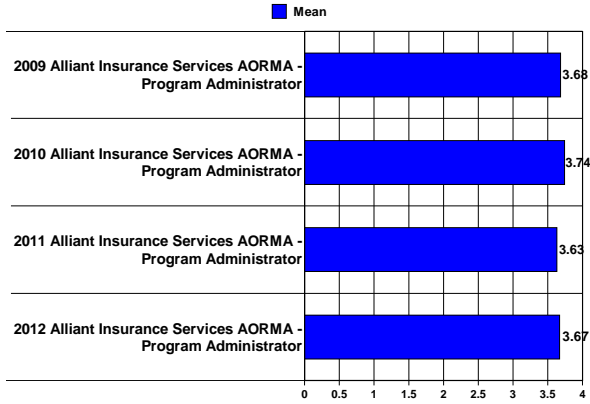
Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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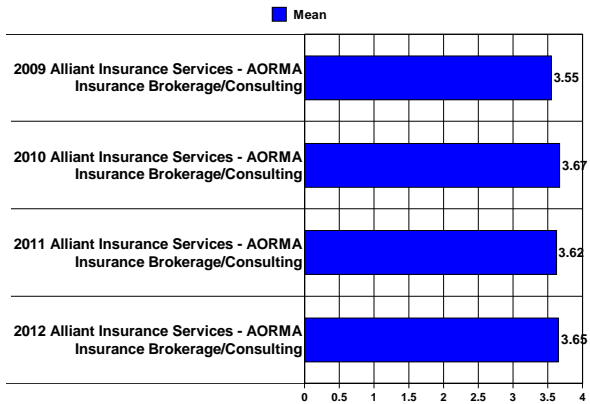
**Overall level of satisfaction - Alliant Insurance Services AORMA - Program Administrator by Year**

Analysis...: Overall level of satisfaction  
 Break.....: Alliant Insurance Services AORMA - Program Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



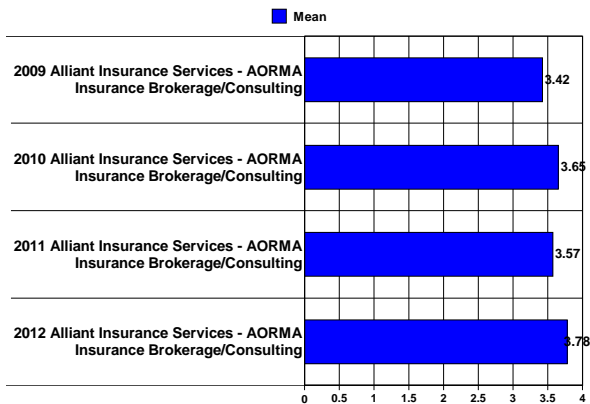
**Responds promptly to inquiries and requests - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Maintains contact and keeps campus apprised on important and pertinent matters - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

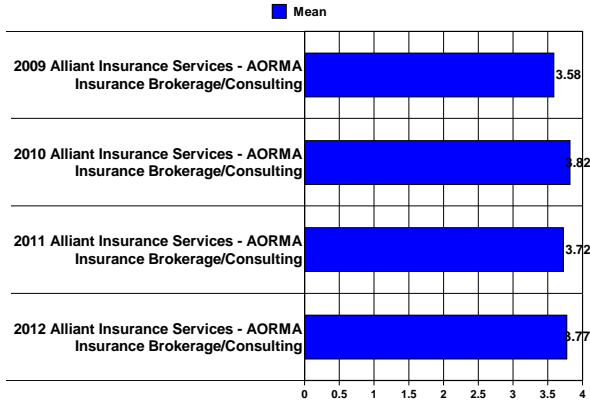
Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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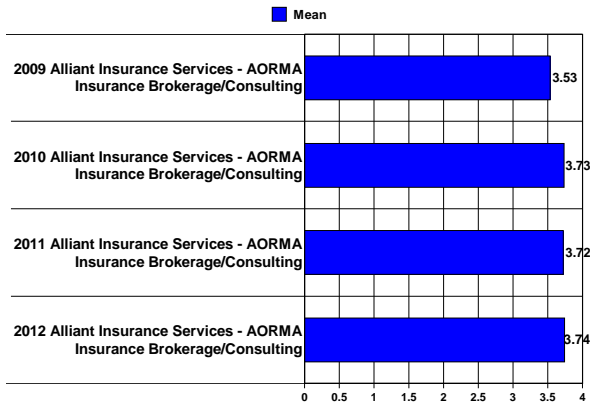
**Provides high quality advice and assistance - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

Analysis...: Provides high quality advice and assistance  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



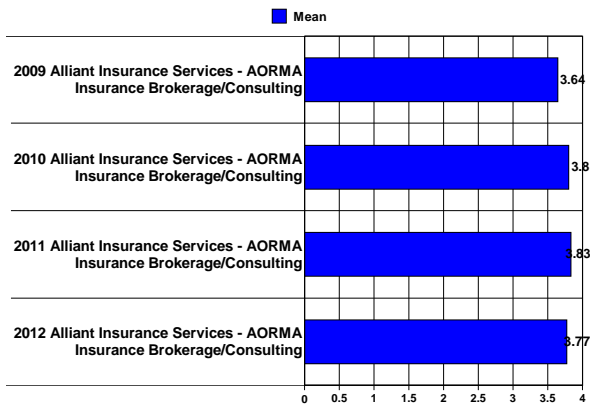
**Communicates well both orally and in writing - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

Analysis...: Communicates well both orally and in writing  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Handles all interactions in a professional manner - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

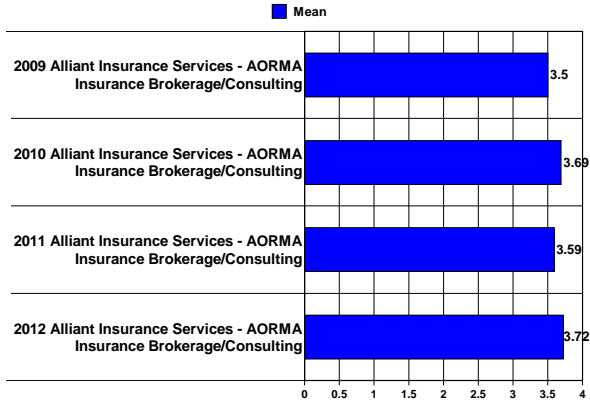
Analysis...: Handles all interactions in a professional manner  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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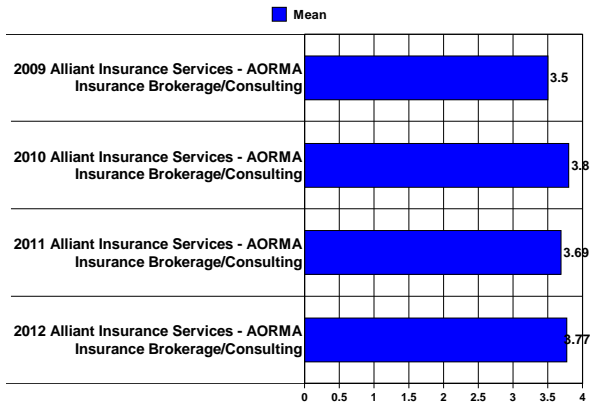
**Accomplishes goals and objectives and also provides additional value - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



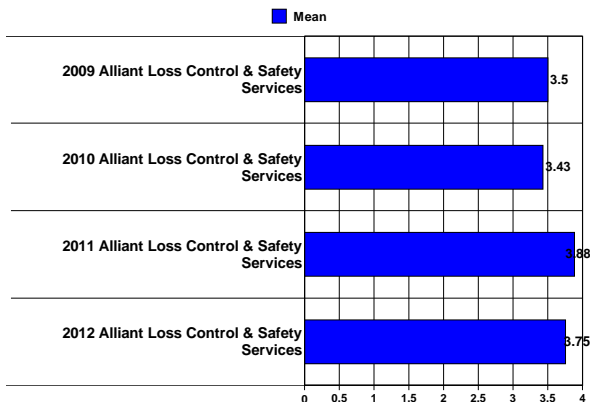
**Overall level of satisfaction - Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year**

Analysis...: Overall level of satisfaction  
 Break.....: Alliant Insurance Services - AORMA Insurance Brokerage/Consulting by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Responds promptly to inquiries and requests - Alliant Loss Control & Safety Services by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Alliant Loss Control & Safety Services by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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**Maintains contact and keeps campus appraised on important and pertinent matters - Alliant Loss Control & Safety Services by Year**

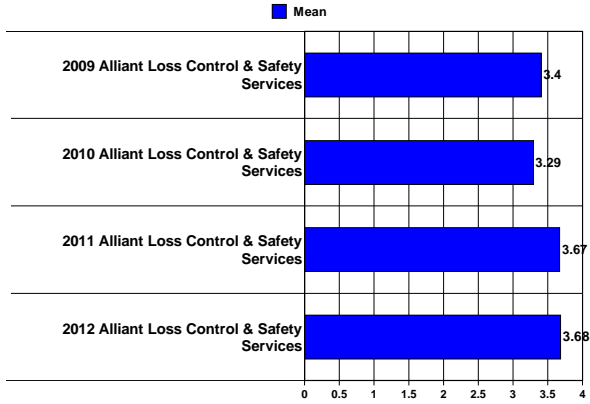
Analysis...: Maintains contact and keeps campus appraised on important and pertinent matters

Break.....: Alliant Loss Control & Safety Services by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



**Provides high quality advice and assistance - Alliant Loss Control & Safety Services by Year**

Analysis...: Provides high quality advice and assistance

Break.....: Alliant Loss Control & Safety Services by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



**Communicates well both orally and in writing - Alliant Loss Control & Safety Services by Year**

Analysis...: Communicates well both orally and in writing

Break.....: Alliant Loss Control & Safety Services by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



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**Handles all interactions in a professional manner - Alliant Loss Control & Safety Services by Year**

Analysis...: Handles all interactions in a professional manner  
 Break.....: Alliant Loss Control & Safety Services by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Accomplishes goals and objectives and also provides additional value - Alliant Loss Control & Safety Services by Year**

Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Alliant Loss Control & Safety Services by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Overall level of satisfaction - Alliant Loss Control & Safety Services by Year**

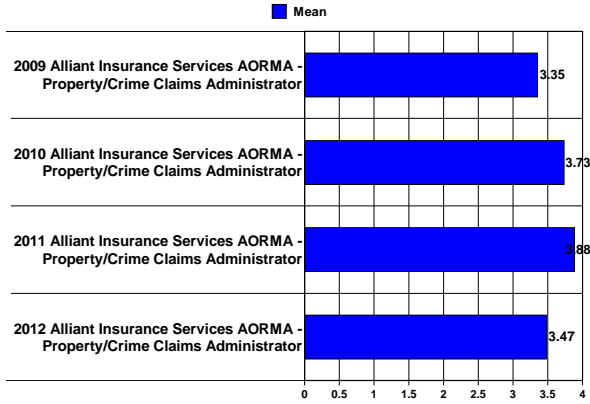
Analysis...: Overall level of satisfaction  
 Break.....: Alliant Loss Control & Safety Services by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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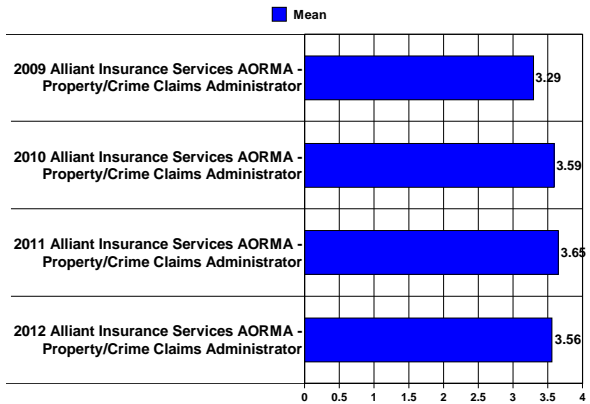
**Responds promptly to inquiries and requests - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



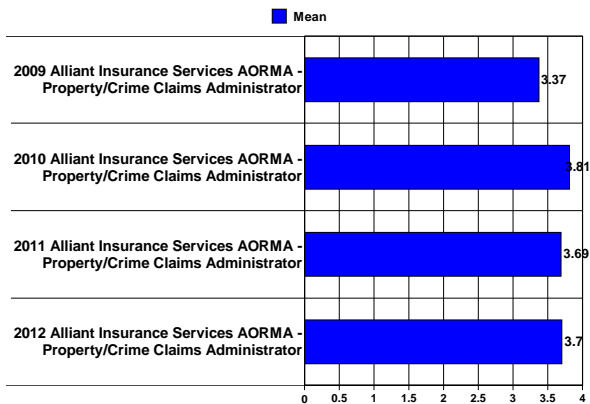
**Maintains contact and keeps campus apprised on important and pertinent matters - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Provides high quality advice and assistance - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

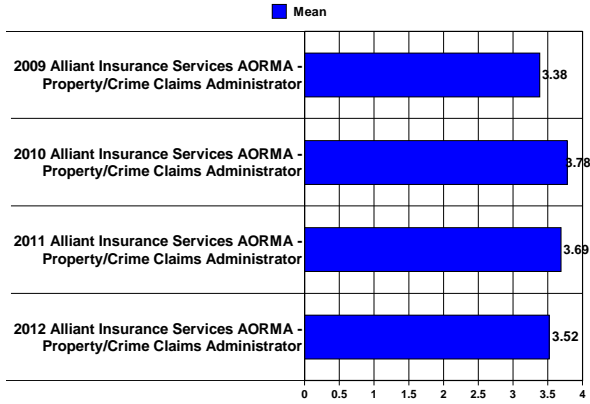
Analysis...: Provides high quality advice and assistance  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

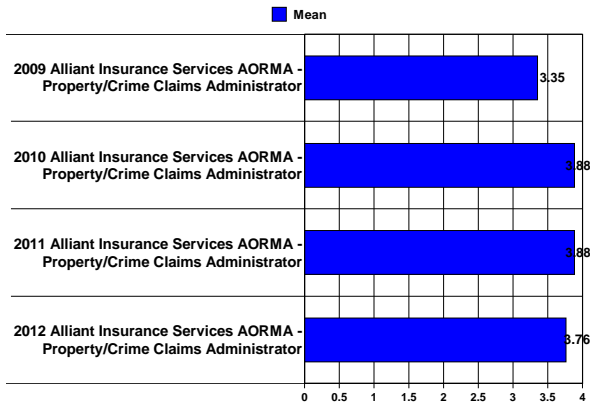
**Communicates well both orally and in writing - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

Analysis...: Communicates well both orally and in writing  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



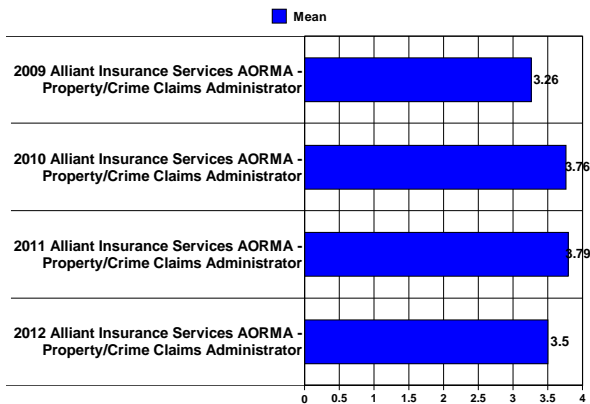
**Handles all interactions in a professional manner - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

Analysis...: Handles all interactions in a professional manner  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Accomplishes goals and objectives and also provides additional value - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

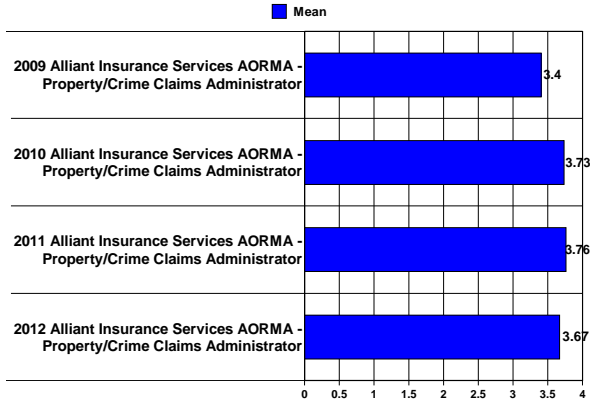
Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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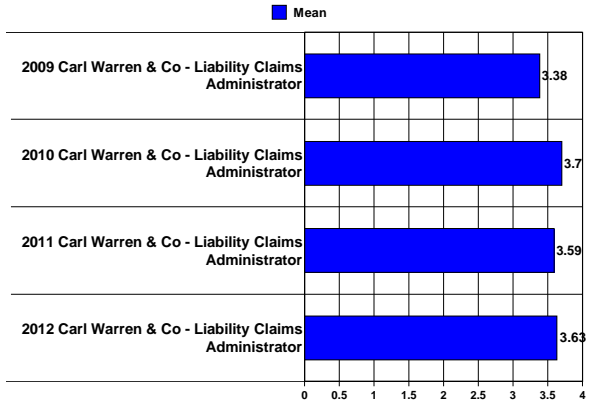
**Overall level of satisfaction - Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year**

Analysis...: Overall level of satisfaction  
 Break.....: Alliant Insurance Services AORMA - Property/Crime Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



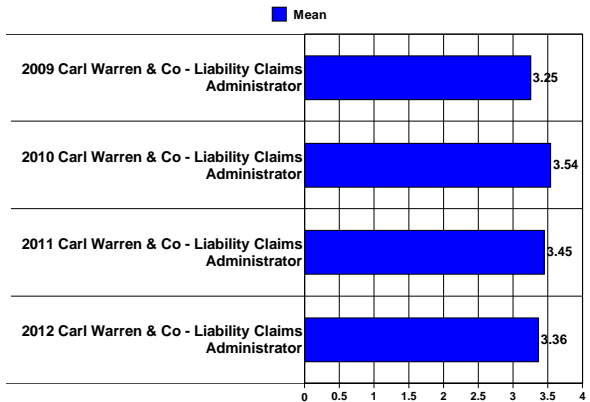
**Responds promptly to inquiries and requests - Carl Warren & Co - Liability Claims Administrator by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Carl Warren & Co - Liability Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Maintains contact and keeps campus appraised on important and pertinent matters - Carl Warren & Co - Liability Claims Administrator by Year**

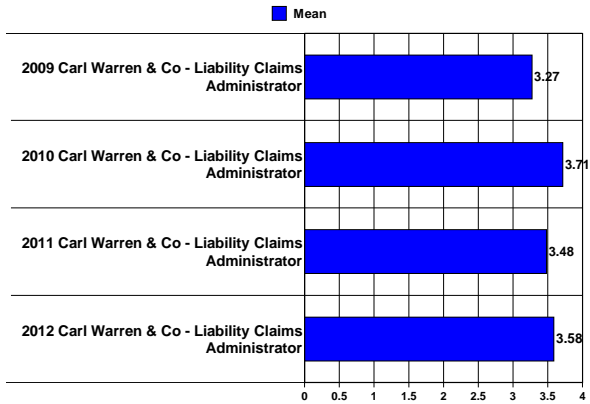
Analysis...: Maintains contact and keeps campus appraised on important and pertinent matters  
 Break.....: Carl Warren & Co - Liability Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



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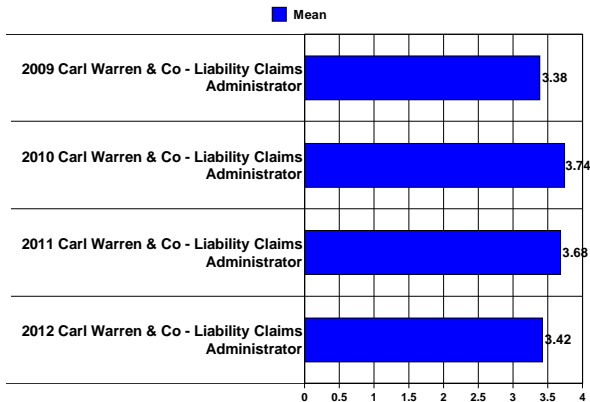
**Provides high quality advice and assistance - Carl Warren & Co - Liability Claims Administrator by Year**

Analysis...: Provides high quality advice and assistance  
 Break..... : Carl Warren & Co - Liability Claims Administrator by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



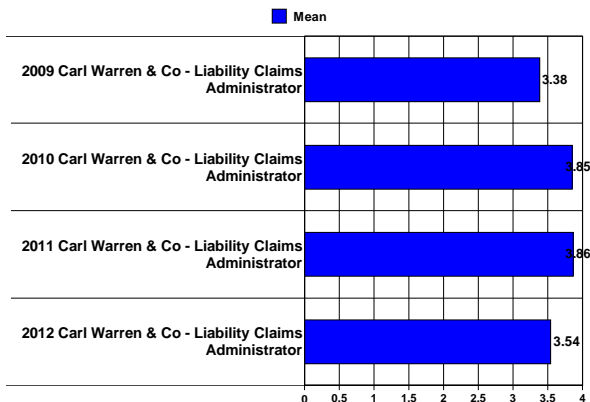
**Communicates well both orally and in writing - Carl Warren & Co - Liability Claims Administrator by Year**

Analysis...: Communicates well both orally and in writing  
 Break..... : Carl Warren & Co - Liability Claims Administrator by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



**Handles all interactions in a professional manner - Carl Warren & Co - Liability Claims Administrator by Year**

Analysis...: Handles all interactions in a professional manner  
 Break..... : Carl Warren & Co - Liability Claims Administrator by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



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**Accomplishes goals and objectives and also provides additional value - Carl Warren & Co - Liability Claims Administrator by Year**

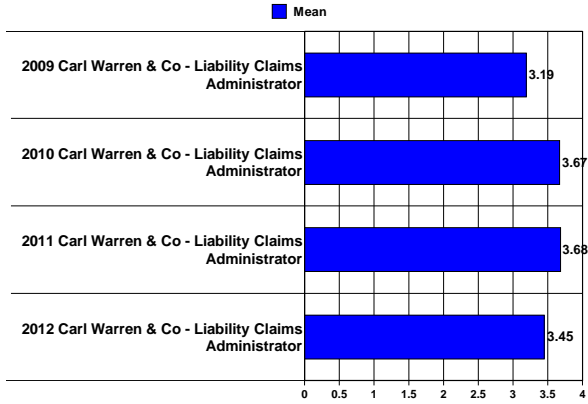
Analysis...: Accomplishes goals and objectives and also provides additional value

Break.....: Carl Warren & Co - Liability Claims Administrator by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



**Overall level of satisfaction - Carl Warren & Co - Liability Claims Administrator by Year**

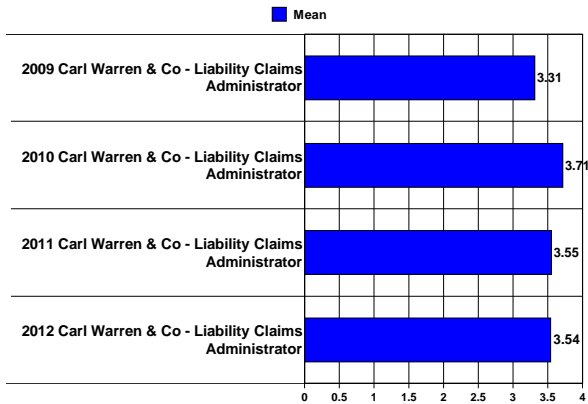
Analysis...: Overall level of satisfaction

Break.....: Carl Warren & Co - Liability Claims Administrator by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



**Responds promptly to inquiries and requests - CO Office of Risk Management - Risk Consulting by Year**

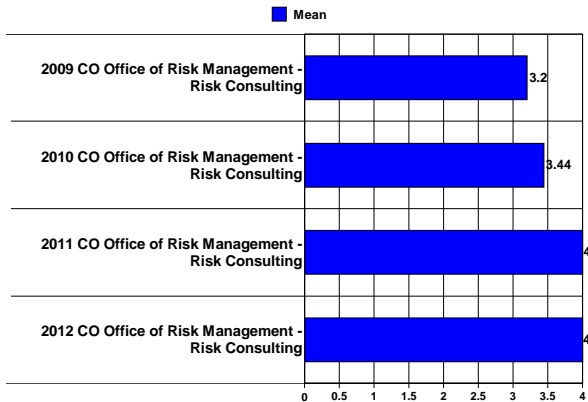
Analysis...: Responds promptly to inquiries and requests

Break.....: CO Office of Risk Management - Risk Consulting by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



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**Maintains contact and keeps campus apprised on important and pertinent matters - CO Office of Risk Management - Risk Consulting by Year**

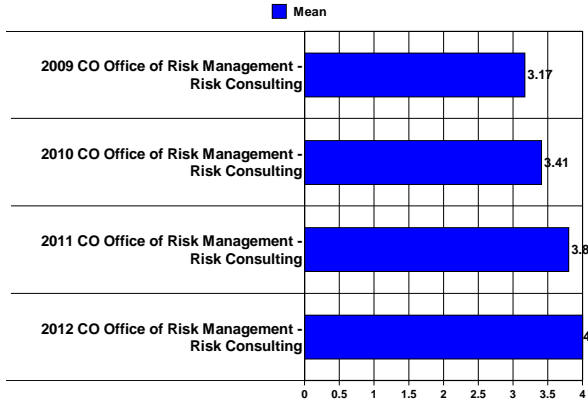
Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters

Break..... : CO Office of Risk Management - Risk Consulting by Year

Filter.....: All Respondents

Score..... : Weight WT1

Cells.....: Counts, Respondents



**Provides high quality advice and assistance - CO Office of Risk Management - Risk Consulting by Year**

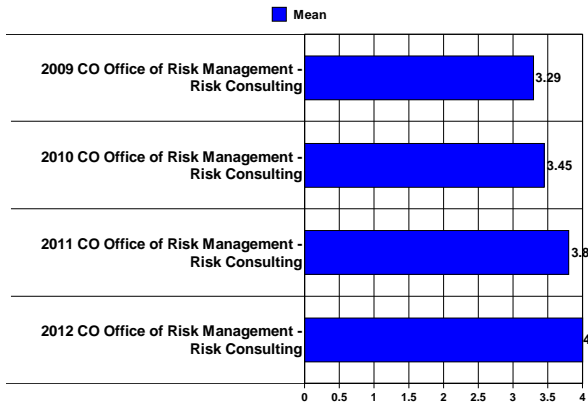
Analysis...: Provides high quality advice and assistance

Break..... : CO Office of Risk Management - Risk Consulting by Year

Filter.....: All Respondents

Score..... : Weight WT1

Cells.....: Counts, Respondents



**Communicates well both orally and in writing - CO Office of Risk Management - Risk Consulting by Year**

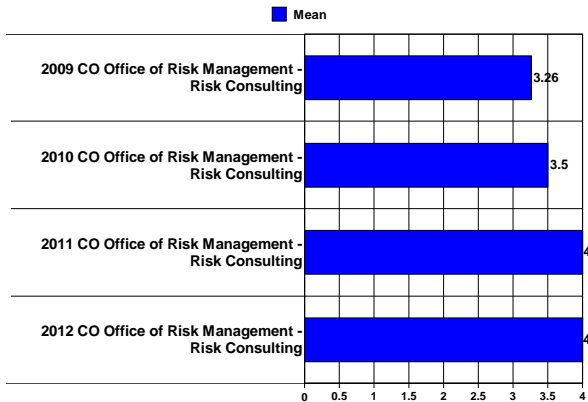
Analysis...: Communicates well both orally and in writing

Break..... : CO Office of Risk Management - Risk Consulting by Year

Filter.....: All Respondents

Score..... : Weight WT1

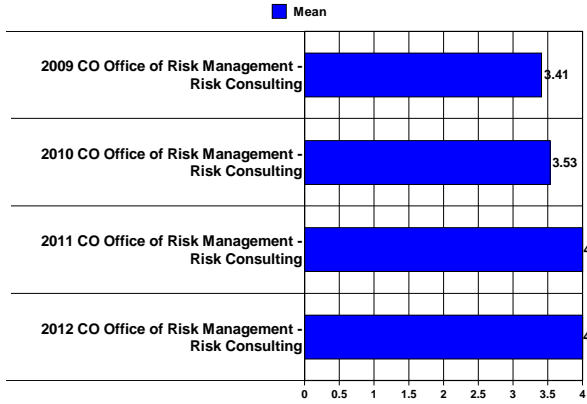
Cells.....: Counts, Respondents



CSURMA AUXILIARY

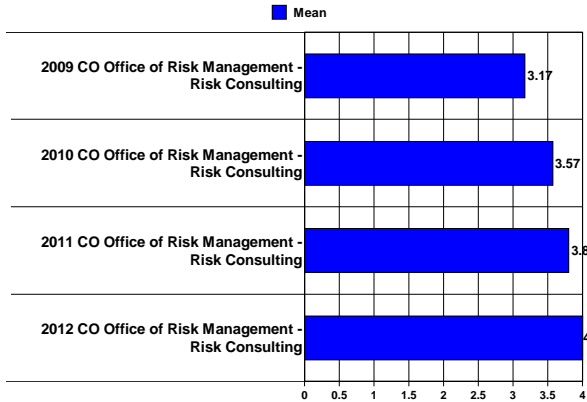
**Handles all interactions in a professional manner - CO Office of Risk Management - Risk Consulting by Year**

Analysis...: Handles all interactions in a professional manner  
 Break..... : CO Office of Risk Management - Risk Consulting by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells..... : Counts, Respondents



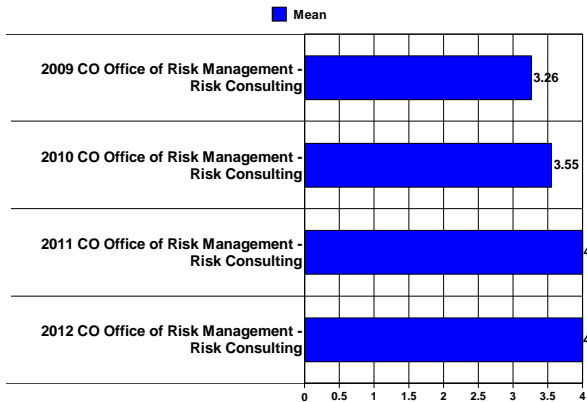
**Accomplishes goals and objectives and also provides additional value - CO Office of Risk Management - Risk Consulting by Year**

Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break..... : CO Office of Risk Management - Risk Consulting by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells..... : Counts, Respondents



**Overall level of satisfaction - CO Office of Risk Management - Risk Consulting by Year**

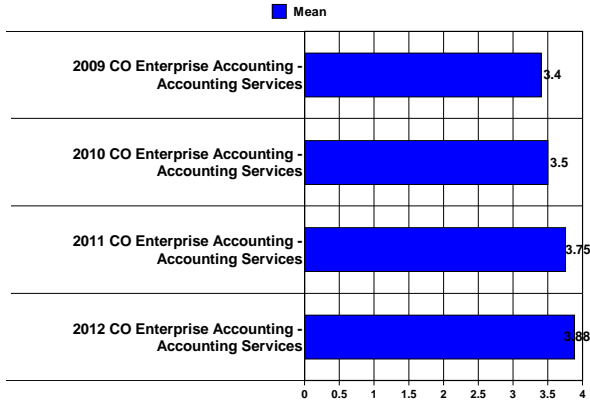
Analysis...: Overall level of satisfaction  
 Break..... : CO Office of Risk Management - Risk Consulting by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells..... : Counts, Respondents



CSURMA AUXILIARY

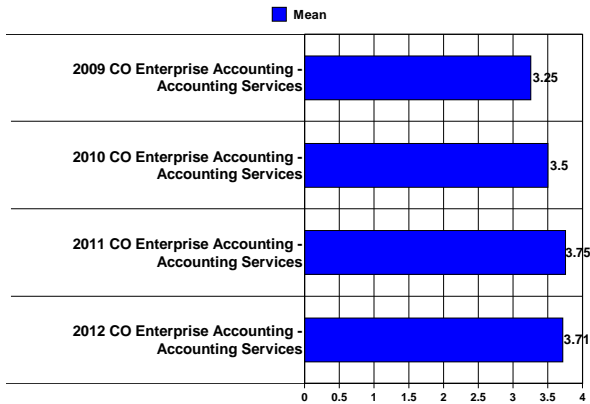
**Responds promptly to inquiries and requests - CO Enterprise Accounting - Accounting Services by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



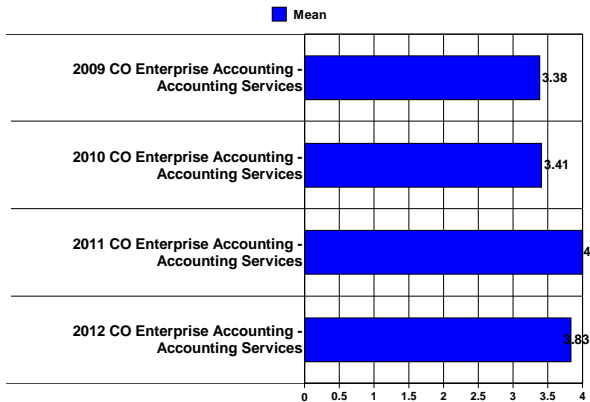
**Maintains contact and keeps campus apprised on important and pertinent matters - CO Enterprise Accounting - Accounting Services by Year**

Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



**Provides high quality advice and assistance - CO Enterprise Accounting - Accounting Services by Year**

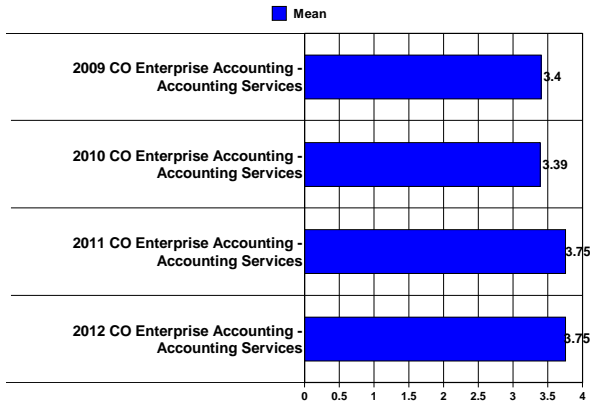
Analysis...: Provides high quality advice and assistance  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



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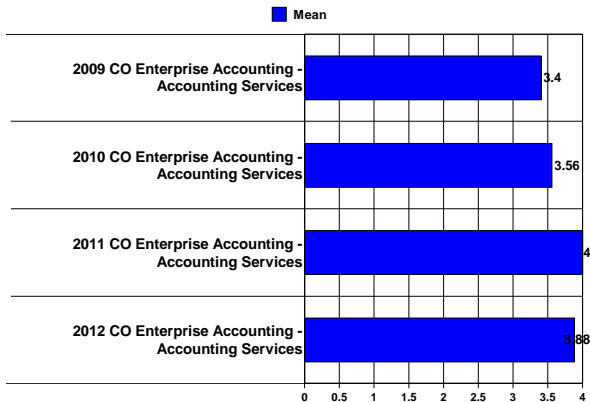
**Communicates well both orally and in writing - CO Enterprise Accounting - Accounting Services by Year**

Analysis...: Communicates well both orally and in writing  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



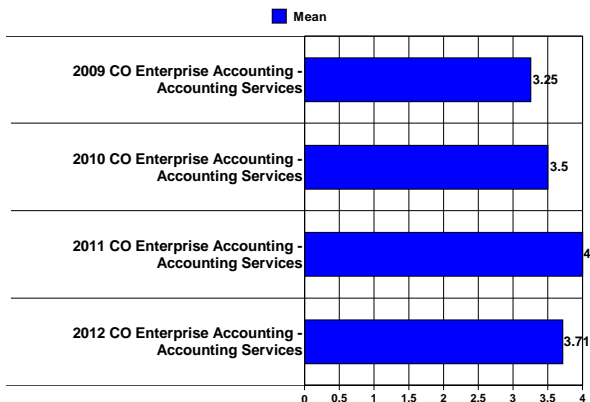
**Handles all interactions in a professional manner - CO Enterprise Accounting - Accounting Services by Year**

Analysis...: Handles all interactions in a professional manner  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



**Accomplishes goals and objectives and also provides additional value - CO Enterprise Accounting - Accounting Services by Year**

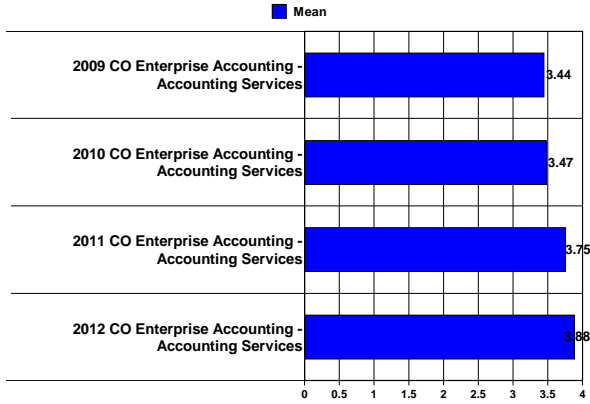
Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

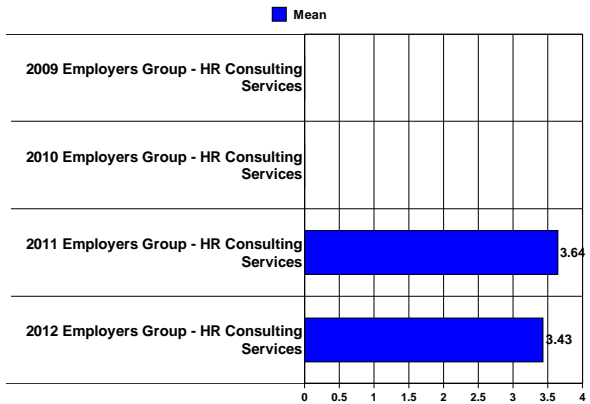
**Overall level of satisfaction - CO Enterprise Accounting - Accounting Services by Year**

Analysis...: Overall level of satisfaction  
 Break..... : CO Enterprise Accounting - Accounting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



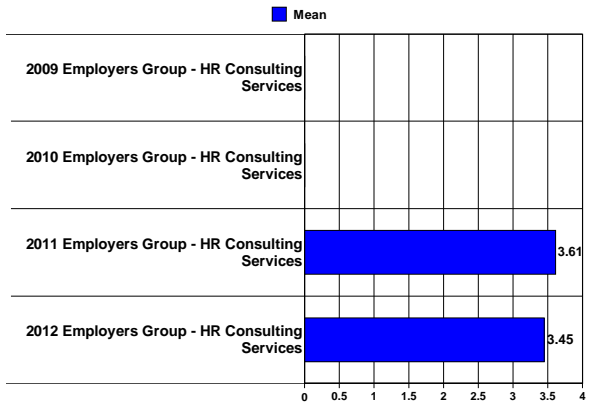
**Responds promptly to inquiries and requests - Employers Group - HR Consulting Services by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break..... : Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



**Maintains contact and keeps campus appraised on important and pertinent matters - Employers Group - HR Consulting Services by Year**

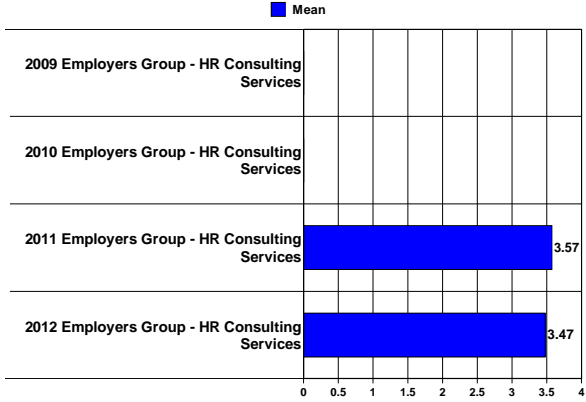
Analysis...: Maintains contact and keeps campus appraised on important and pertinent matters  
 Break..... : Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

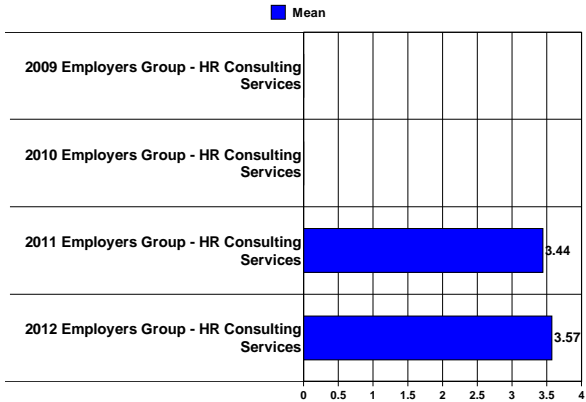
**Provides high quality advice and assistance - Employers Group - HR Consulting Services by Year**

Analysis...: Provides high quality advice and assistance  
 Break..... : Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



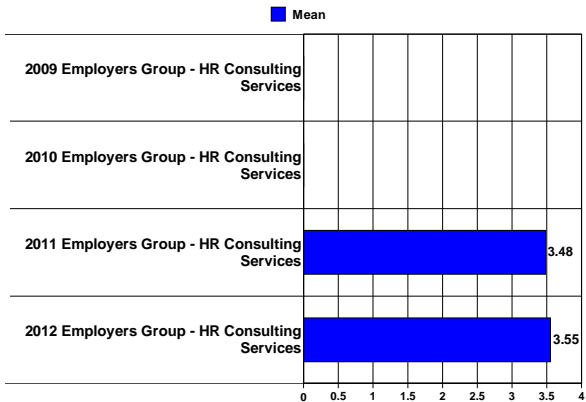
**Communicates well both orally and in writing - Employers Group - HR Consulting Services by Year**

Analysis...: Communicates well both orally and in writing  
 Break..... : Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



**Handles all interactions in a professional manner - Employers Group - HR Consulting Services by Year**

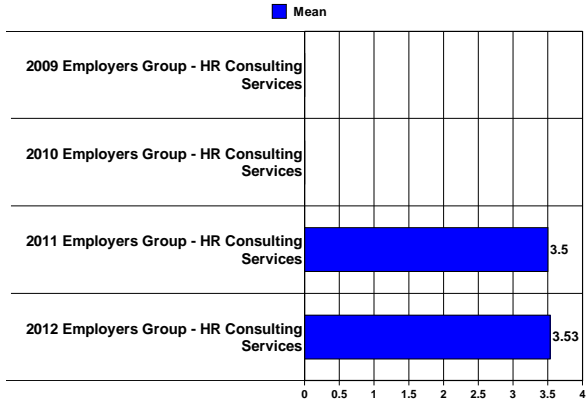
Analysis...: Handles all interactions in a professional manner  
 Break..... : Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score..... : Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

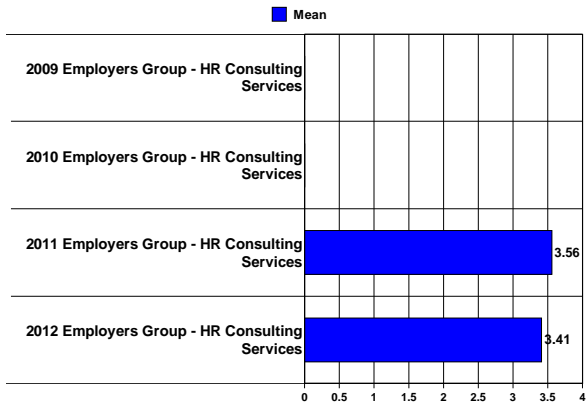
**Accomplishes goals and objectives and also provides additional value - Employers Group - HR Consulting Services by Year**

Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



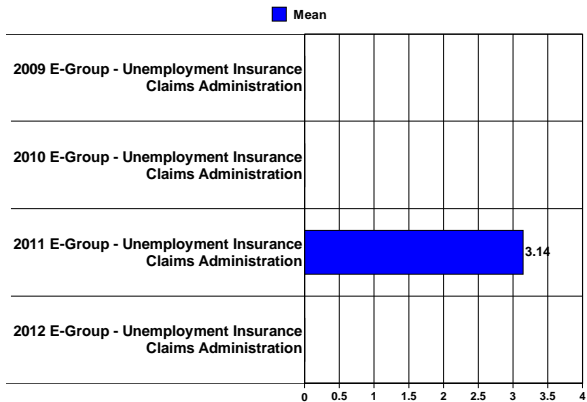
**Overall level of satisfaction - Employers Group - HR Consulting Services by Year**

Analysis...: Overall level of satisfaction  
 Break.....: Employers Group - HR Consulting Services by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Responds promptly to inquiries and requests - E-Group - Unemployment Insurance Claims Administration by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: E-Group - Unemployment Insurance Claims Administration by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

**Maintains contact and keeps campus appraised on important and pertinent matters - E-Group - Unemployment Insurance Claims Administration by Year**

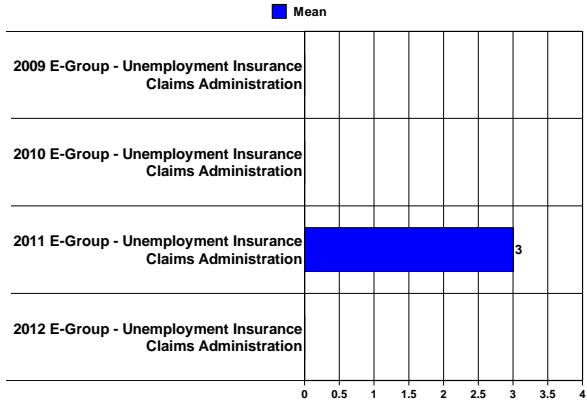
Analysis...: Maintains contact and keeps campus appraised on important and pertinent matters

Break.....: E-Group - Unemployment Insurance Claims Administration by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



**Provides high quality advice and assistance - E-Group - Unemployment Insurance Claims Administration by Year**

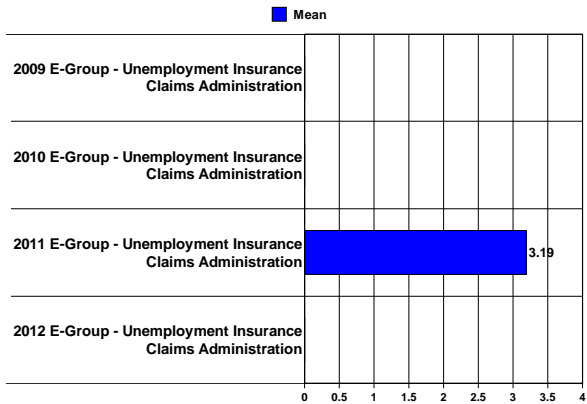
Analysis...: Provides high quality advice and assistance

Break.....: E-Group - Unemployment Insurance Claims Administration by Year

Filter.....: All Respondents

Score.....: Weight WT1

Cells.....: Counts, Respondents



**Communicates well both orally and in writing - E-Group - Unemployment Insurance Claims Administration by Year**

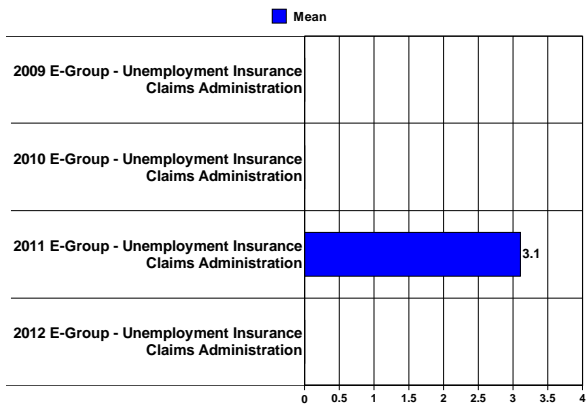
Analysis...: Communicates well both orally and in writing

Break.....: E-Group - Unemployment Insurance Claims Administration by Year

Filter.....: All Respondents

Score.....: Weight WT1

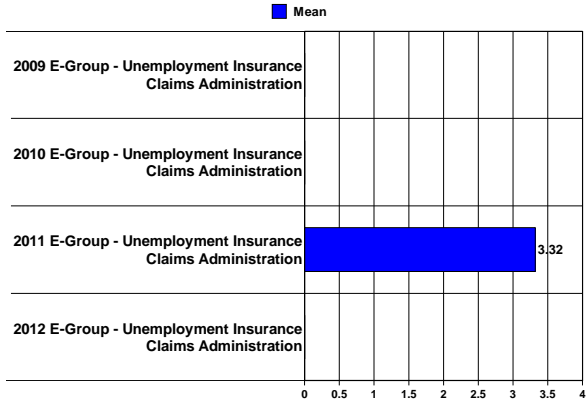
Cells.....: Counts, Respondents



CSURMA AUXILIARY

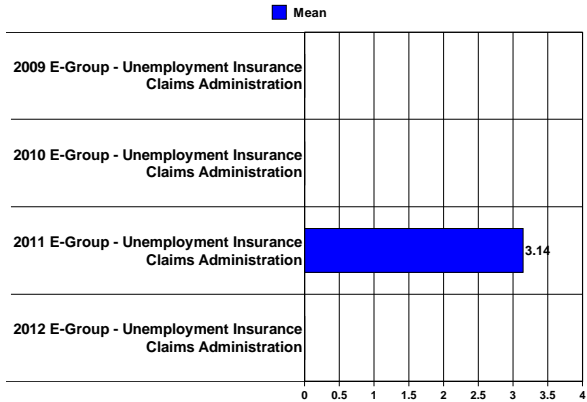
**Handles all interactions in a professional manner - E-Group - Unemployment Insurance Claims Administration by Year**

Analysis...: Handles all interactions in a professional manner  
 Break.....: E-Group - Unemployment Insurance Claims Administration by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



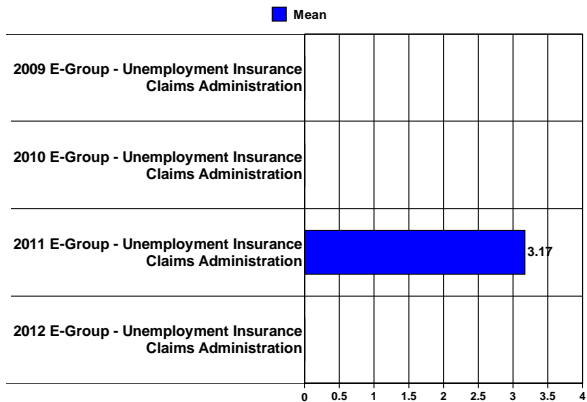
**Accomplishes goals and objectives and also provides additional value - E-Group - Unemployment Insurance Claims Administration by Year**

Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: E-Group - Unemployment Insurance Claims Administration by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Overall level of satisfaction - E-Group - Unemployment Insurance Claims Administration by Year**

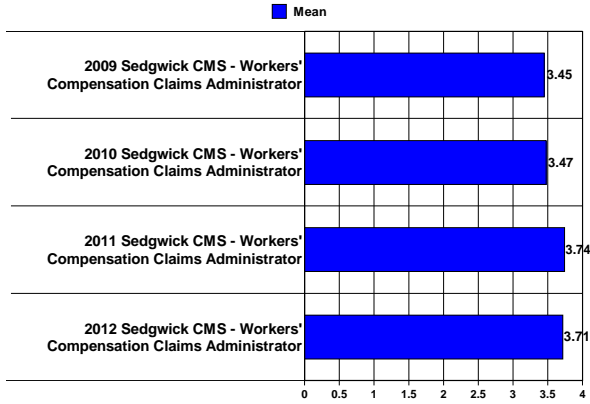
Analysis...: Overall level of satisfaction  
 Break.....: E-Group - Unemployment Insurance Claims Administration by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

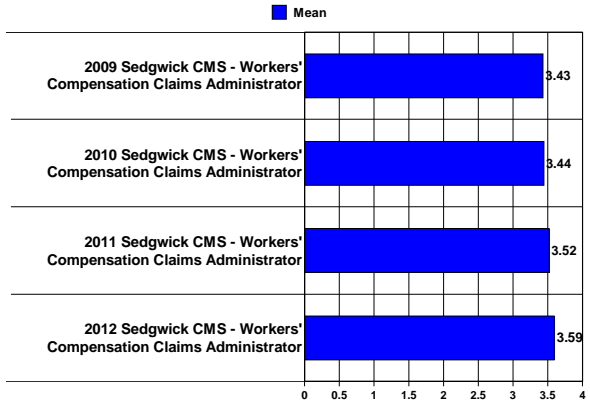
**Responds promptly to inquiries and requests - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



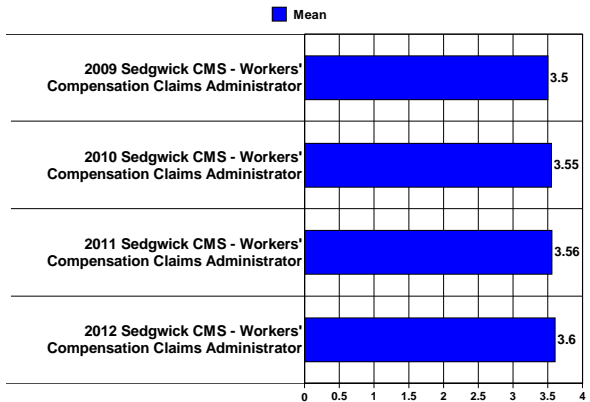
**Maintains contact and keeps campus apprised on important and pertinent matters - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Provides high quality advice and assistance - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

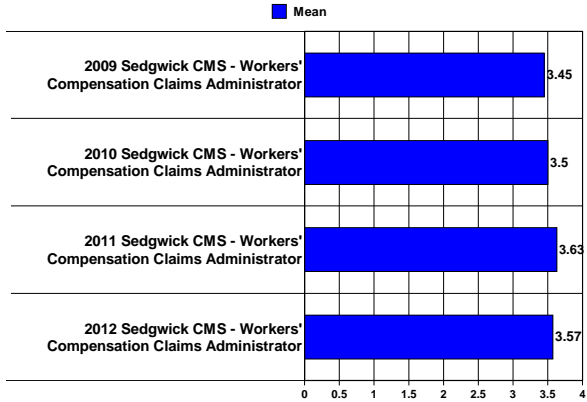
Analysis...: Provides high quality advice and assistance  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

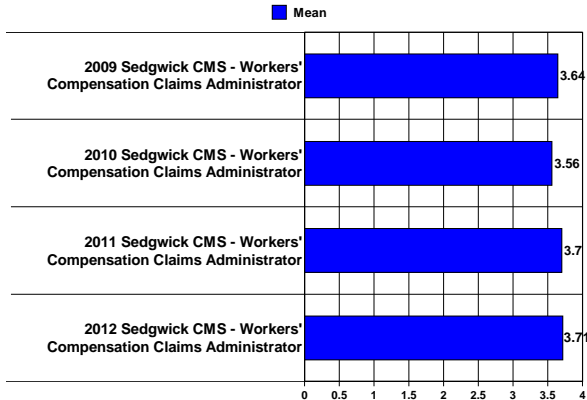
**Communicates well both orally and in writing - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

Analysis...: Communicates well both orally and in writing  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



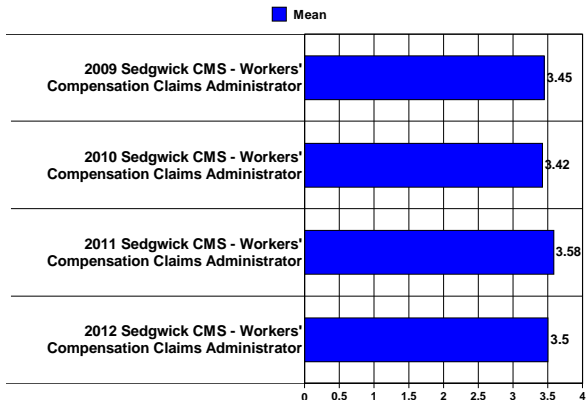
**Handles all interactions in a professional manner - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

Analysis...: Handles all interactions in a professional manner  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Accomplishes goals and objectives and also provides additional value - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

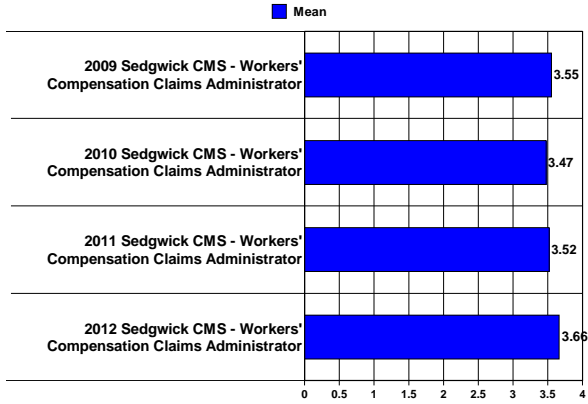
Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

**Overall level of satisfaction - Sedgwick CMS - Workers' Compensation Claims Administrator by Year**

Analysis...: Overall level of satisfaction  
 Break.....: Sedgwick CMS - Workers' Compensation Claims Administrator by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Responds promptly to inquiries and requests - Target Safety - Web-based Training by Year**

Analysis...: Responds promptly to inquiries and requests  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Maintains contact and keeps campus apprised on important and pertinent matters - Target Safety - Web-based Training by Year**

Analysis...: Maintains contact and keeps campus apprised on important and pertinent matters  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

**Provides high quality advice and assistance - Target Safety - Web-based Training by Year**

Analysis...: Provides high quality advice and assistance  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Communicates well both orally and in writing - Target Safety - Web-based Training by Year**

Analysis...: Communicates well both orally and in writing  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Handles all interactions in a professional manner - Target Safety - Web-based Training by Year**

Analysis...: Handles all interactions in a professional manner  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



CSURMA AUXILIARY

**Accomplishes goals and objectives and also provides additional value - Target Safety - Web-based Training by Year**

Analysis...: Accomplishes goals and objectives and also provides additional value  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents



**Overall level of satisfaction - Target Safety - Web-based Training by Year**

Analysis...: Overall level of satisfaction  
 Break.....: Target Safety - Web-based Training by Year  
 Filter.....: All Respondents  
 Score.....: Weight WT1  
 Cells.....: Counts, Respondents





Date: March 7, 2013

To: AORMA Committee:

From: Brent Escoubas, C.S.P.

Alliant Risk Control Consulting would like to thank the members of AORMA for making this our most active year in providing loss control services. By the end of June 2013 we will have provided over 650 hours of loss control service to AORMA members, (over 200 more hours of service compared to 2011/2012).

Our services in 2012/2013 focused on creating custom programs designed at targeting high frequency and severity areas such as dining services and driving safety. We are also working with members on creating custom training videos and online programs that are focused specifically on loss leaders and high turnover positions. The custom program will have the ability to be integrated in to a learning management system such as Target Solutions.

In the fall of 2013 our department will be restructuring geographical territories, which includes adding personnel to Northern California. Having Risk Control staff in Northern and Southern California, will help us improve the quality of loss control services and products provided to members.

It truly is a pleasure working with AORMA and we look forward to providing another year of loss control services. We welcome any feedback on how we can better serve AORMA and its members.



## **EMPLOYERS GROUP ANALYSIS OF CSURMA 2012 ANNUAL PERFORMANCE SURVEY**

### **Background**

Employers Group has been providing Human Resource and Organizational Development guidance to the CSU Auxiliaries for two years. Over that period of time we have fielded well over 500 calls addressing the full range of employment-related issues. The calls received involve both compliance and employee relations concerns; consequently, many calls can be handled with a simple yes or no answer, and many others require in depth discussion and follow up.

Due to the unique employment and organizational processes at the auxiliaries, EG has designated two Senior Helpline Consultants as direct contacts for the authorized users at each auxiliary. There is an option to reach out directly to one of these two designates, or to call directly to the main Helpline number to ensure an immediate response to the question. Additionally, the auxiliaries have direct access to EG's subject matter experts in areas such as Affirmative Action, Unemployment Claims, Compensation, COBRA, etc.

In the case of the auxiliaries (as with the EG membership in general), we receive calls from a wide range of individuals tasked with employment issues. This includes experienced, senior-level HR professionals as well as others who may be filling the role of HR in lieu of a dedicated HR leader. This drives home the value of the services even more; while, at the same time, often leading to a degree of surprise as to the complexity of state and federal labor law compliance..

By nature, EG is focused on providing the safest advice to minimize risk to the employer. This is not always the answer a caller may want to hear; but, it is generally in the best interest of the caller to consider the advice very carefully. Additionally, the EG Helpline Consultants are high-level, senior HR specialists and not practicing attorneys. There are times when a caller may be referred to counsel - in the case of the auxiliaries, to Richard Bromley.

### **General Response to Survey**

The feedback on EG services included in the 2012 survey is very much in line with our usual client satisfaction surveys. It is always a challenge to have everyone fully in line with all the advice and guidance we provide, but most utilizers of our services do appreciate the support, and respect the level of expertise among the staff. Looking at the responses, it stands out that there is one individual that is very dissatisfied with our service, while most of the others view our services as good to very good.

## **Negatives**

The fact that there was a drop in rating in several categories is disappointing. In 2012 we increased from one dedicated Senior Consultant to two dedicated Senior Consultants, to increase responsiveness and the level of expertise available. Still, there was a slight drop in the rating for promptness

There was also a drop in the “mainlining contact” category. This is an area we targeted this year by offering two auxiliary-specific webinars and by several pieces of email correspondence developed specifically for the auxiliaries. We had hoped to see an improvement in this category.

The slight drop in rating on the question of providing high quality advice and guidance probably ties into the comment regarding EG “not really knowing us well enough to respond quickly.” While we have devoted a good amount of time over the last two years to getting the dedicated staff up-to-speed on the unique issues facing the auxiliaries, this is an on-going process. There are nuances that we are still learning and (because we tend to be very cautious in our approach) there are times when we will take time to do some research or consult with another team member, before providing an answer. We hope this is mitigated by establishing the dedicated team, but there are times when other EG consultants will be speaking with representatives of the auxiliaries and may not be as fully up-to-speed as the dedicated team should be.

The fourth drop off was in the overall level of satisfaction category, and this is the most disappointing. We accept that the nature of our interactions will not always be in a positive context, but we strive to ensure that the value of the advice and guidance we provide will help to overcome the occasionally unpleasant environment overriding the interaction.

## **Positives**

It is encouraging to see that we have reached a higher level of satisfaction on communicating “orally and in writing.” Much of this can probably be attributed to many of the auxiliaries learning more about how to best use our services and becoming familiar with the value of our resource center.

It is always pleasant to be viewed as increasingly “professional,” and a part of the improvement in this category is probably the result of making a few changes in the dedicated staff.

The third area of improvement is in the area of “providing additional value.” This also is probably the result of the auxiliaries attaining a higher degree of familiarity with our services. It is natural to reach out to us for advice on simple compliance issues; but, at this point, it seems that we are able to get involved on a deeper and more strategic level in many situations.

The general comments on the survey provide a very encouraging evaluation of EG services for the most part.

### **Summary and Action Steps**

Overall the survey results are positive for Employers Group and also provide some excellent insight as to what we can do to improve our services going forward. The report will be shared with the service team at EG so everyone will be aware of the strengths and weaknesses as viewed by our clients.

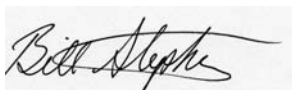
Here are a few key action items:

- In order to overcome the concerns relative to our promptness, we will conduct a retraining of the entire client service team to ensure that they are more familiar with the process in place for the auxiliaries and are prepared to expedite calls and emails. This should already be the case, but a subtle reminder will be helpful
- In order to address the concerns about “knowing” the auxiliaries well enough, we will continue to train the entire staff on the nuances of the auxiliaries. This has also been an on-going process, and we can continue to strengthen this. In 2013 we became a business partner in order to have the opportunity to participate in the AOA conference, and this gave us an extra opportunity to learn more about the concerns and issues that the auxiliaries deal with on a daily basis. Even our CEO attended this event.
- To address the concerns regarding our communication with the auxiliaries, we will continue to offer the CSURMA-specific webinars (we have one being planned for May on the Affordable Health Care Act), and we will conduct a reach-out to make sure that our rosters are up-to-date and that anyone not familiar with our services will receive either a phone or in-person orientation – as we did in 2010.

The survey provides us with an excellent blue print for building off of our positives and improving on the negatives. All of this seems to be very workable, and we are looking forward to continuing to make the adjustments necessary to be an invaluable resource to the auxiliaries.

Thank you for the opportunity to review the survey and to share this feedback.

Sincerely,



Bill Stephens  
Client Service Director  
Employers Group

March 6, 2013  
Alliant Insurance Services  
Attention: Mimi Long  
100 Pine Street, 11<sup>th</sup> Floor  
San Francisco, CA 94111

Re: 2012 Vendor Survey

Dear Mimi,

My staff and I have reviewed the data and comments included in the 2012 Vendor Survey. We appreciate you sharing the results with us.

TargetSolutions endeavors to deliver quality technology solutions and excellent customer support to every user, client and partner. After reviewing the survey results we are pleased to find that 99% of respondents viewed TargetSolutions as Good or Meeting Expectations in several areas: responds promptly to inquiries, communicates well both orally and in writing and handles all interactions in a professional manner. While this feedback is encouraging we are aware we can always improve and elevate our customer's experience.

Listed below you will see our notes and plan of action as it relates to comments shared by survey respondents that fell below expectation.

#### **Comment #2 – Sexual Harassment Training**

*This individual expressed some disappointment in the way our Sexual Harassment Course is "organized and presented." Additionally they noted some frustration in the progress bar only showing half complete when the user believes they have completed the entire course.*

*In 2012 TargetSolutions completed a complete overhaul of our AB1825 – Sexual Harassment for Supervisors Course to incorporate engaging video material, voice narration, high definition multimedia and new "scenario based" learning exercises – all designed to address comments and suggestions we have received from clients about this course. We launched this new version of AB1825 on December 4<sup>th</sup>, 2012. Since the re-launch, we have seen the overall rating of the course increase in excess of 5 percentage points. Users who respond to our course feedback surveys are now recommending our AB1825 course more than 90% of the time. We hope this particular user will be able to experience the new course in the future and we apologize for the unsatisfactory experience they had with our previous course.*

*As a user navigates through any of our timed courses they are able to view and monitor a progress bar that outlines the amount of time spent in the course, as it relates to what is required by law. To ensure a user does not simply open a course and idle on a particular page or scree, each page is capped to record no more than 5 minutes of active participation. As an example, if a user opens our AB1825 course and begins to move through the lessons, they may occasionally get sidetracked, multitask or leave the screen*

*to address an immediate need. When they return to the course they may simply move on to the next lesson (not noticing their progress in the bar). At the end of the course (or when the user notes 2 hours on their watch or clock) they assume they have completed the course and are ready to take the test – only to find their progress bar half full creating the perception that our progress bar is incorrect. Our Client Services team is trained in how to deal with this type of inquiry; their goal is to walk the user through a series of questions and cross-checks to ensure our system is not reflecting an inaccuracy and to ensure the user is comfortable in their understanding of why this may occur.*

### **Comment #3 – Customization of Email, Perceived Inability to Add Content to a Course & Manual Removal of Users**

*Currently our system allows for many different notifications to be sent to users as a way of keeping current and in compliance with their scheduled activities and training. While the emails do state in the subject line the organization TargetSolutions is sending on behalf of, these emails do not currently allow for adjustments to the body of the email. We enhance our platform with upgrades and potentially new tools on a regular basis. We prioritize which enhancements to create based on which will benefit the greatest number of users across all the industries we serve. Should this functionality be included in our program in the future we will be sure to let your members know of the change.*

*Regarding “generic content,” all of our courses are built to nationally accepted standards and may not contain specific “custom” information a particular member may want to see. However, all of our courses allow for the attachment of any additional content, training information, video, PDF or similar resource to the end of the standard TargetSolutions course. This ensures the member is able to deliver our sponsored content along with their own. To the same point, members can upload their own custom published training courses to our system and assign them in the same fashion as TS sponsored courses. TargetSolutions does offer custom course creation, fees based on complexity of the topic and development hours.*

*Lastly, the user mentions the inability to batch delete users from the system. While we never actually “delete” an active user (it is mandated we store completion records for each participant of our program) we do offer members the ability to “batch inactivate” users by submitting a spreadsheet to their assigned Account Manager. Normal turnaround for this process is approximately 5 to 10 business days. We would be happy to work with this particular respondent in any of the areas listed above to help achieve a better experience with our platform.*

### **Comment #6- Change of Assigned Account Manager & Proactive Notification of New Features/Upgrades**

*It is our goal to provide consistency to our clients in all areas, particularly as it relates to their main point of contact at TargetSolutions. Since 2010, AORMA members have experienced one Account Manager adjustment, members are currently working with Ashley Cole. In addition to our dedicated Account Managers we offer full Client Service support from a team of experienced customer service staff. It is common for calls to route to our CS team first and then be escalated to the Account Manager if is a more complex question or one that requires Account Manager involvement. We apologize if the Account*

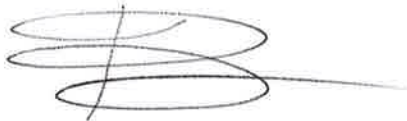
*Manager change which occurred in 2012 was a distribution or a frustration. Please know we only make adjustments with our Account Managers when it is absolutely necessary.*

*Regarding the request asking for notification of new releases to the system, I want to announce the launch of a new email, beginning April 1<sup>st</sup>, which will be delivered to all TargetSolutions administrators. This newsletter will highlight new course titles and revisions, enhancements and upgrades to the program and other important updates. We believe this newsletter will address the concern about proactive notification left by this responder.*

In closing, I hope my responses have effectively addressed any questions arising from the 2012 Vendor Survey. We welcome the feedback of your members and strive to create and deliver an excellent product. More importantly, we value the relationship we have built with AORMA and your members. We take your concerns and questions seriously.

We are thankful for our partnership and appreciate your continued business. We are looking forward to a great 2013!

Kind Regards,



**Kelly Zielinski** | Business Unit Manager

Direct: 858.683.7229

Email: [kaz@targetsolutions.com](mailto:kaz@targetsolutions.com)

**REVIEW OF THE ALLIANT LOSS CONTROL SERVICES  
UTILIZATION REPORT**

**ISSUE:** Attached for the Committee's review is the Alliant Loss Control Services Utilization Report.

**RECOMMENDATION:** No action is recommended. This item is for information only.

**FISCAL IMPACT:** The annual fee for Alliant Loss Control Services is \$72,500, which provides the Auxiliary Organizations with 50 safety days annually. The cost of each safety day is \$1,450. This expense is currently included within the CSURMA AORMA budget and therefore, has already been collected from each Auxiliary Organization.

**BACKGROUND:** This is a one year contract. The current term of this contract is July 1, 2012 to June 30, 2013.

**PUBLICATION:** None

**ATTACHMENT(S):**

- a. Alliant Loss Control Services – Utilization Report.

**AORMA 2012-13 Loss Control Service Summary (As of 05/01/2013)**

2011/2012 Contract Amount	\$58,000.00
2011/2012 Rollover	-\$4,552.00
2012/2013 Contract Amount	\$72,500.00
<b>Contract Adendum 03/21/2013</b>	<b>\$18,125.00</b>
<b>Total Available 2012/2013</b>	<b>\$86,073.00</b>
<b>Remaining 2012/2013</b>	<b>\$613.63</b>
<b>2013/2014 Contract Amount</b>	<b>\$87,000.00</b>
<b>Total Available 2013/2014</b>	<b>\$87,613.63</b>

Service Summary			
Location	Date(s)	Service	Hours
AORMA		Administrative	30
University Corp - CSUN	07/03/12	Ergonomic Assessment	8
UE - Sacramento	07/05/12	Safety Program Review	1
Cal Poly - SLO	07/05/11	Bookstore Fire Impariment	1
Research Foundation - SJSU	07/12/12	Ergo Assesment - Rancho Cordova	8.5
Research Foundation - Long Beach	07/16/12	Ergonomic Assessment	4
UE - Sacramento	07/18/12	Safety training /Ergo Assessment	11.5
ASI - Long Beach	07/18/12	Fire Ext Training	4
ASI - Long Beach	07/24/12	First Aid, CPR, AED	4
ASI - Long Beach	07/26/12	First Aid, CPR, AED	8
ASI - Long Beach	07/28/12	Fire Ext Training	4
HR Conf SLO	07/26/12	IIPP Training	16.5
AS/UE - Humboldt	08/06/12	Safety Traning Day	14.5
UE - Humboldt	08/13/12	Safety Rec Follow up	1
AOA Conf Presentation	08/15/12	Youth Programs/Safety Mgmt	2
ASI- Cal Poly Pomona	08/27/12	Risk Management Training	16
UEI - Sacramento	08/28/12	Ergonomic Assessment	7.5
UEI - Sacramento	08/29/12	IIPP Assessment	5.5
Student Union - SJSU	8/29/2012	Ergonomic Assessment	6.5
AS - Fresno	8/31/2012	First Aid, CPR, AED	16
ASI - Long Beach	9/12/2012	Passenger van training	12
Cal Poly Corporation	9/19/2012	IIPP Review	2.5
Cal Poly Corporation	9/21/2012	Safety Assessment	10
University Corp - CSUN	10/9/2012	Safety Assessment	8
ASI - SJSU	10/12/2012	Child Development Ctr	8.5
Foundation - Cal Poly Pomona	10/15/2012	Safety Assesement	8
Foundation - Cal Poly Pomona	10/16/2012	OSHA Compliance training	16
ASI - SJSU	10/19/2012	Child Development Ctr Safety Training	15.5
ASI - Long Beach	10/23/2012	Van Safety Video	6
University Corp - Monterey	10/31/2012	Ergo Evaluations	12
Corporation - SLO	11/6/2012	Safety Assessment	12
49er Shops - Long Beach	11/28/2012	IIPP Review	4
AOA Conf Presentation	12/6/2012	Claims and Loss Control	4
Corporation - SLO	12/10/2012	LC Grant Program Review	12
ASI - Long Beach	1/07-1/09/13	Van Safety Video	24
Fresno Association	1/10/2013	IIPP Review	4
ASI - Long Beach	1/29/2013	Van Safety Training Program Devel	5
AS - San Diego	2/1/2013	Safety Day(s) Training	24
Loker Student Union - DH	2/8/2013	First Aid, CPR, AED	12
University Corp - Sacramento	2/12/2013	OSHA Compliance	2
ASI - Long Beach	2/12/2013	Van Safety Training	5
Research Corp - Long Beach	2/12/2013	Ergo Evaluations	6
49er Shops - Long Beach	2/19/2013	Safety Assessment and presentation	8
AS - Sacramento	2/20/2013	Safety Assessment	24
AS - Fullerton	2/26/2013	IIPP Review	3.5
Research Foundation - SJSU (NASA)	2/27/2013	Ergo Evaluations	6
Corporation - SLO	3/8/2013	Safety Grant - Program Development	4
Corporation - SLO	3/25/2013	Video Script for Grant Program	4
Student Union - SJSU	4/2/2013	Ergo Evaluations	6
AS - Fullerton	4/4/2013	Customer Service Training	10
Foundation - Cal Poly Pomona	5/1/2013	Safety Day(s) Training	24
		<b>Total Hours Used</b>	<b>471.5</b>
		<b>Cost</b>	<b>\$ 85,459.38</b>
		<b>Total Available as of 05/01/13</b>	<b>\$613.63</b>

## **REVIEW OF THE TARGET SOLUTIONS UTILIZATION REPORT**

**ISSUE:** Attached for the Committee's review is the TargetSolutions utilization report.

**RECOMMENDATION:** No action is recommended. This item is for information only.

**FISCAL IMPACT:** The FY 12/13 annual fee for TargetSolutions is \$80,750. This cost is currently included within the CSURMA AORMA budget and therefore, has already been collected from each Auxiliary Organization. Based on the number of courses completed within 2012 – 12,464 - AORMA is paying approximately \$6.47 per seat.

**BACKGROUND:** This is a three year contract. The term of this contract is July 1, 2012 to June 30, 2015.

**PUBLICATION:** None

**ATTACHMENT(S):**

- a. TargetSolutions – AORMA 2012 Member Metrics Report

# AORMA 2012 Member Metrics

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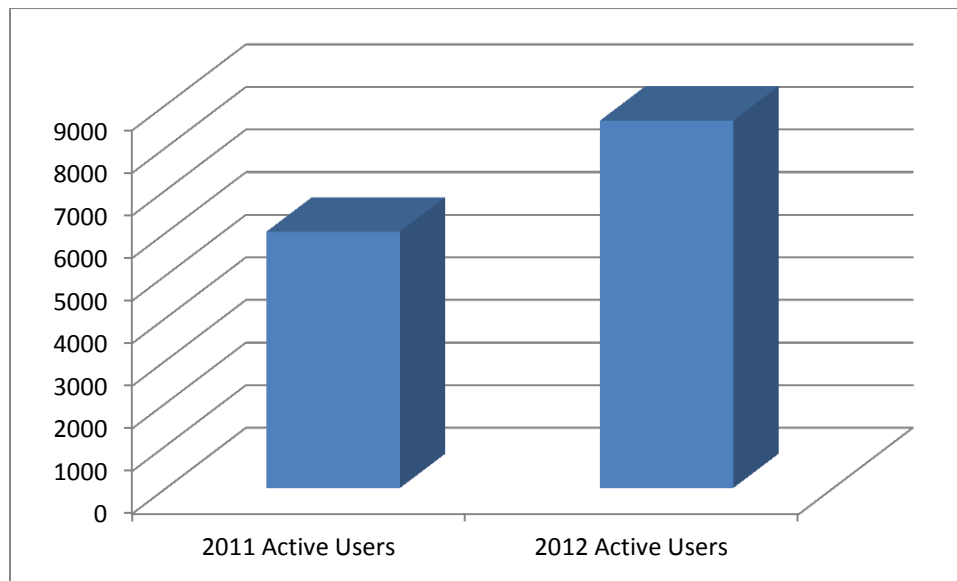
## 2011 Business Review Goals:

1. Increase Activity by 15%

*The data that is presented below is based on a 12 month analysis.*

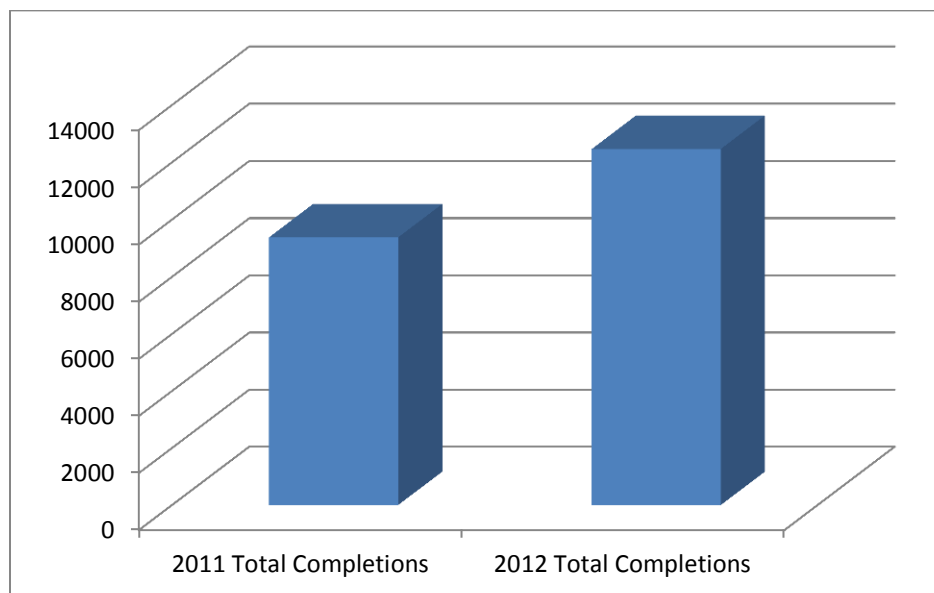
## 2012: User Participation

In 2011, there were 6,018 Active Users in the TargetSolutions system. In 2012, we have increased the total number of Active Users to **8,625**. This is a **43% increase** from 2011 to 2012. The number of total users on the system has **increased 48%** in 2012.



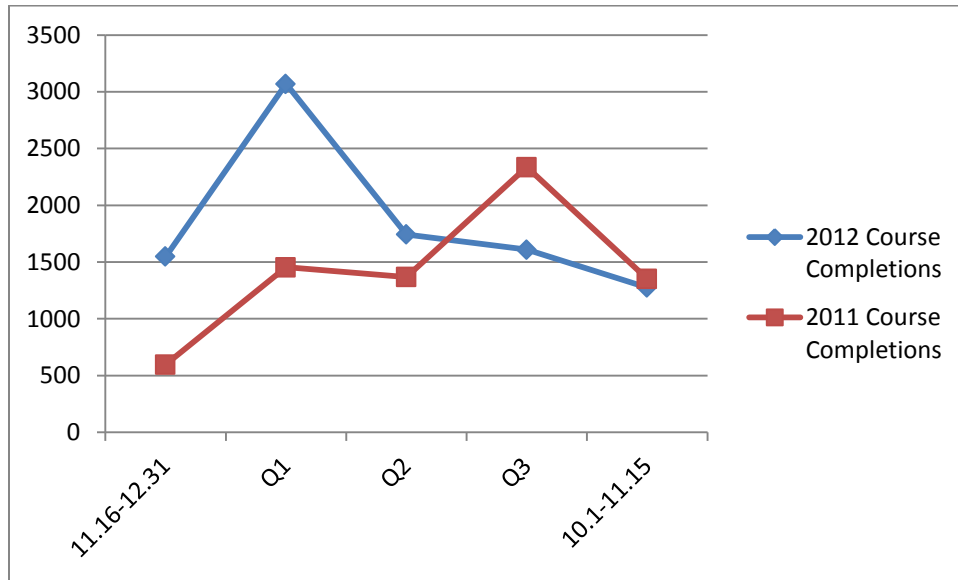
## 2012: Total Completions

In 2011, there were 9,376 total completions – of courses & activities. In 2012 there were **12,464 total course and activity completions** from all member sites. This is a **33% increase**.



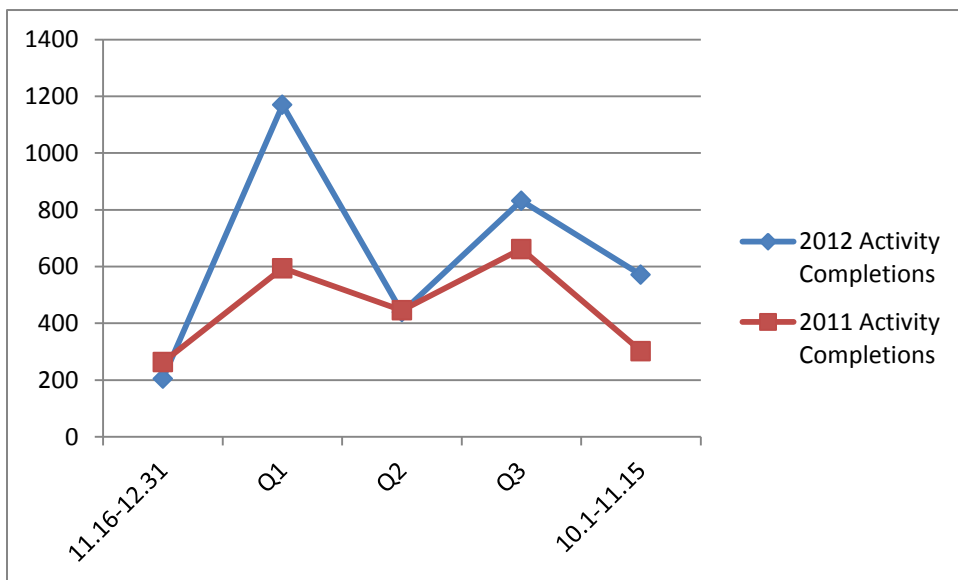
## 2012: Total Course Completions

In 2012, we see an increase in number of active users completing courses. In 2011, there were 7,109 total course completions while in 2012 there were **9,247** course completions from all member sites. This is an **increase of 30%** in total course completions.



## 2012: Total Activity Completions

In 2012, we see an increase in number of active users completing custom activities. In 2011, there were 2,267 total activity completions while in 2012 there were **3,217** total activity completions from all member sites. This is an **increase of 42%** in total activity completions.



## **REVIEW OF THE EMPLOYERS GROUP UTILIZATION REPORT**

**ISSUE:** Attached for the Committee's review is the Employers Group utilization report.

**RECOMMENDATION:** No action is recommended. This item is for information only.

**FISCAL IMPACT:** Currently, the annual rate per Auxiliary Organization is \$485, or a total of \$27,855. This expense is currently included within the CSURMA AORMA budget and therefore, has already been collected from each auxiliary member. Based on the number of Helpline Calls and Resource Library Calls of 438 and 151, respectively, AORMA is paying approximately \$54 per call.

**BACKGROUND:** The current contract was extended from February 28, 2013 to June 30, 2013, so that the results of the Vendor Survey (sent out by the CSU Chancellor's Office) would be available for review prior to renewing this contract effective July 1, 2013.

The Employers Group has been providing HR consulting services to AORMA members since March 1, 2011.

**PUBLICATION:** None

**ATTACHMENT(S):**

- a. Employers Group Utilization Report as of May 20, 2013

**AORMA - HR Consulting  
Employers Group  
Utilization Report as of 5/20/2013**

Type of Activity	Total Activity - As of 7/15/2011	Total Activity - As of 10/21/2011	Total Activity - As of 1/25/2012	Total Activity - As of 3/12/2012	Total Activity - As of 6/11/2012	Total Activity - As of 7/11/2012	Total Activity - As of 10/22/2012	Total Activity - As of 1/23/2013	Total Activity - As of 5/20/2013	Notes
Helpline Calls	54	194	251	283	326	332	363	388	438	5/20/2013 - 42 auxiliaries have called
Resource Library	22	61	82	94	106	108	118	130	151	
Comp/Benefits Survey Participation	2	2	2	2	2	2	3	4	6	
Roundtable/Webinar Attendance	8	8	8	14	22	22	22	29	44	
Public Workshop Trainings*	4	4	4	4	8	8	8	8	9	
Registration - Workplace/Employment Law Update		5	8	8	8	8	17	21	21	
Inquiry/Proposed – On-Site Training*	5	6	7	8	8	10	13	14	18	
Contracted - On-Site Training	0	0	2	5	5	7	9	11	14	
Inquiry/Proposed - On-Line training		1	1	1	3	4	4	4	5	
Contracted - On-Line Training			1	1	2	3	3	3	3	
Inquiry/Proposed Affirmative Action Planning	2	3	4	4	6	6	9	10	11	(Includes one OFCCP audit)
Contracted - Affirmative Action Planning	0	1	2	2	4	4	6	6	7	
Contracted - Affirmative Action Plan Audit Support	0	1	1	1	1	1	1	1	1	
Inquiry/Proposed – Employee Handbook*	3	3	3	3	3	3	3	3	3	Zero contracted
Inquiry/Proposed – E.O.S.*	1	1	1	1	1	1	1	1	1	
Contracted - EOS	0	0	1	1	1	1	1	1	1	
Inquiry/Proposed – Consulting*	2	3	3	4	5	5	7	8	8	
Contracted - Consulting	0	0	1	1	1	1	1	1	1	Job Description Analysis and Revision
Inquiry/Proposal - Unemployment Insurance Management	1	1	1	1	1	1	2	3	3	
Contracted - Unemployment Insurance Management	0	1	1	1	1	1	1	1	1	Not including CSURMA Pooled Program
Inquiry/Proposal - Comp.Benefits Planning	0	1	2	5	6	6	7	7	9	
Contracted - Research, Comp/Benefits Planning	0	1	1	2	3	3	3	3	4	
Other (Books, CD ROMs, Posters, etc.)									3	

**FY 12/13 AORMA LONG RANGE ACTION PLAN**

**ISSUE:** The Program Administrator includes a copy of the current AORMA Long Range Action Plan in every agenda.

**RECOMMENDATION:** No action is requested; this item is for information only.

**FISCAL IMPACT:** None.

**BACKGROUND:** None.

**PUBLICATION:** None.

**ATTACHMENT(S):**

- a. FY 12/13 AORMA Long Range Action Plan

## CSURMA AORMA FY 12/13 - LONG RANGE ACTION PLAN

#	RESPONSIBLE ENTITY	ACTION/RESPONSIBILITY	DEADLINE	STATUS
<b>AORMA COMMITTEE</b>				
A-1	<b>FORMULA FOR DETERMINING AN AO'S MINIMUM EPL DEDUCTIBLE</b>			
	AORMA Committee	Review and approve EPL deductible size criteria	October 25, 2012	Completed
	AORMA Committee	Review and approve P&P – Formula for Determining an AO's Minimum EPL Deductible	December 6, 2012	Completed
	AORMA Committee	Review and approve list of AO's that will be subject to a higher EPL	December 6, 2012	Completed
	AORMA Committee	Review and approve updated deductible credits based on the \$50,000, \$75,000 and \$100,000 amount	December 6, 2012	Completed
	Staff (Alliant)	Notify AO's of deductible changes and options	January 1, 2013	Completed
A-2	<b>CSURMA WEBSITE</b>			
	Staff (Alliant)	Create and launch the new CSURMA website	July 1, 2013	
A-3	<b>AORMA UIP – CLAIMS ADMINISTRATION</b>			
	Staff (Alliant)	Send out RFP for UIP claims administration	October 5, 2012	Completed
	UIP Ad Hoc Committee	Review responses to RFP and make a recommendation to the AORMA Committee for the FY 13/14 UIP claims administration renewal	November 1, 2012	Completed
	AORMA Committee	Review proposals for UIP claims administration and approve claims administrator	December 6, 2012	Completed
A-4	<b>CAMPUS VISITS</b>			
	Staff (Alliant)	Complete individual PowerPoint Presentations for all 89 Auxiliary Organizations	February, 2013	Completed
	Staff (Alliant)	Visit each campus and meet with the individual Auxiliary Organizations.	Ongoing	

## CSURMA AORMA FY 12/13 - LONG RANGE ACTION PLAN

#	RESPONSIBLE ENTITY	ACTION/RESPONSIBILITY	DEADLINE	STATUS
<b>AORMA COMMITTEE</b>				
A-5	<b>LEGAL OPINION REGARDING AUXILIARY ORGANIZATION STUDENT UI CLAIMS</b>			
	CSURMA Legal Counsel	Obtain a legal opinion from legal counsel as to how student UI claims should be handled	January 1, 2013	Completed
	Staff (Alliant)	Survey all UIP members to see how they are handling student UI claims	February 1, 2013	Completed
	AORMA Committee	Review legal opinion and survey results	March 21, 2013	Completed
	AORMA Committee	Participate in a more thorough discuss regarding the legal opinion and survey results	May 10, 2013	Completed
	AORMA Committee	Review and approve Policy and Procedure regarding student UI claims	September, 2013	The AORMA Committee decided to not take formal action
	Staff (Alliant)	Send out approved Policy and Procedure regarding student UI claims	September, 2013	

## CSURMA AORMA FY 12/13 - LONG RANGE ACTION PLAN

#	RESPONSIBLE ENTITY	ACTION/RESPONSIBILITY	DEADLINE	STATUS
<b>PROGRAMS COMMITTEE</b>				
P-1 <b>EARTHQUAKE INSURANCE PROGRAM</b>				
	Staff (Alliant)	Send out survey to see which AORMA members are interested in joining the EQ Insurance Program	April 1, 2012	Completed
	Staff (Alliant)	Complete RMS Catastrophe Risk Report	July 1, 2012	Completed
	Staff (Alliant)	Present RMS Catastrophe Risk Report to the AORMA Committee	September 1, 2012	Completed
	AORMA Committee	Discuss if there is a fiscal ability to form an EQ Insurance Program reviewing the results of the California elections.	December 6, 2012	Completed
	Staff (Alliant)	Begin underwriting, rating and pricing the EQ Insurance Program	December, 2012	Completed
	Staff (Alliant)	Send out estimated program pricing to all AORMA members who responded to the EQ survey.	January 31, 2013	Completed
P-2 <b>ONE-RATE WORKERS' COMPENSATION PROGRAM (for FY 14/15 term)</b>				
	PC	Discuss current rating and allocation methodology	January 3, 2013	Completed
	PC	Review alternative rating and allocation methodologies	April 18, 2013	Project Terminated
	PC	Review and approve <b>final</b> revised rating and allocation methodology	August 1, 2013	
	AORMA Committee	Review and approve <b>final</b> revised rating and allocation methodology	September 11, 2013	
	Staff (Alliant)	Notify AO's of their new premium allocation	January 1, 2014	

## CSURMA AORMA FY 12/13 - LONG RANGE ACTION PLAN

#	RESPONSIBLE ENTITY	ACTION/RESPONSIBILITY	DEADLINE	STATUS
<b>PROGRAMS COMMITTEE</b>				
P-3	<b>PROPERTY and CRIME PROGRAMS – RATING METHODOLOGY (for FY 14/15 term)</b>			
	PC	Discuss current rating and allocation methodology	January 3, 2013	Completed
	PC	Review alternative rating and allocation methodologies (first review)	April 18, 2013	Completed
	PC	Review alternative rating and allocation methodologies (second review)	June 6, 2013	
	PC	Review and approve <b>final</b> revised rating and allocation methodology	August 1, 2013	
	AORMA Committee	Review and approve <b>final</b> revised rating and allocation methodology	September 11, 2013	
Staff (Alliant)	Notify AO's of their new premium allocation	January 1, 2014		
P-4	<b>AORMA WORKERS' COMPENSATION PAYROLL RULES TO FOLLOW</b>			
	Staff (Alliant)	Review the AORMA Workers' Compensation Payroll Rules to Follow document and make suggestions for change as necessary	December 2012	Completed
	PC	Review revisions, if any, and recommend approval to the AORMA Committee	January 3, 2013	Completed
AORMA Committee	Review and approve modifications to the AORMA Workers' Compensation Payroll Rules to Follow document	March 21, 2013	Completed	

## CSURMA AORMA FY 12/13 - LONG RANGE ACTION PLAN

#	RESPONSIBLE ENTITY	ACTION/RESPONSIBILITY	DEADLINE	STATUS
<b>MEMBER SERVICES, LOSS CONTROL AND TRAINING COMMITTEE</b>				
M-1	<b>RISK REDUCTION INCENTIVE GRANT PROGRAM (for FY 12/13)</b>			
	MSLCTC ad hoc	Approve recipients of the Risk Reduction Incentive Grant Funds	November 5, 2012	Completed
	MSLCTC ad hoc	Provide a recap of the grant program at the AoA Conference	January , 2013	Completed
M-2	<b>RISK REDUCTION MATCHING GRANT PROGRAM (for FY 13/14)</b>			
	MSLCTC	Approval of Formal Policy and Procedure for the Risk Reduction Matching Grant Program	February 4, 2013	Completed
	AORMA Committee	Approval of Formal Policy and Procedure for the Risk Reduction Matching Grant Program	March 21, 2013	Completed
	MSLCTC	Review Workers' Compensation and Liability claims information @ 12/31/12 and determine criteria for matching grant program	February 4, 2013	Completed
	Staff (Alliant)	Send out notification to AORMA members of the grant criteria and solicit participants	June, 2013	
	MSLCTC	Review grant applications received; approve participants	August, 2013	
M-3	<b>FACILITIES USE AGREEMENT</b>			
	MSLCTC	Review AORMA Recommended Facilities Use Agreement – recommend amendments as appropriate	November 5, 2012	Completed
	MSLCTC	Review and Approve additional recommended changes to the Facilities Use Agreement as provided by CSURMA Legal Counsel	February 4, 2013	Completed
	AORMA Committee	Review and Approve AORMA Recommended Facilities Use Agreement	March 21, 2013	Completed
	Staff (Alliant)	Update AORMA Toolkit with approved Facilities Use Agreement	April, 2013	Completed
	Staff (Alliant)	Send out AORMA Bulletin notifying members of the new Facilities Use Agreement	April, 2013	Completed

## CSURMA AORMA FY 12/13 - LONG RANGE ACTION PLAN

#	RESPONSIBLE ENTITY	ACTION/RESPONSIBILITY	DEADLINE	STATUS
M-4	<b>ON-LINE SAFETY TRAINING</b>			
	MSLCTC	Continue to monitor on-line safety training through SkillSoft	November 5, 2012	Completed
	MSLCTC	Review optional on-line safety training through SkillSoft; provide recommendation to the AORMA Committee  The MSLCTC is not recommending that the on-line training services be changed at this time.	February 4, 2013	Completed
	AORMA Committee	If applicable, approve contract with SkillSoft	March 21, 2013	Project Terminated for FY 12/13
	Staff (Alliant)	If applicable, give notice of contract termination to TargetSolutions (60 days in advance of 7/01 renewal). Will review again in FY 13/14.	April 1, 2013	Project Terminated for FY 12/13

**CSURMA AORMA 2013 MEETING CALENDAR**

**ISSUE:** The Program Administrator includes a current copy of the CSURMA AORMA meeting calendar in every agenda

**RECOMMENDATION:** No action is requested on this item.

**FISCAL IMPACT:** None.

**BACKGROUND:** None.

**PUBLICATION:** None.

**ATTACHMENT(S):**

- a. CSURMA AORMA – 2013 Meeting Calendar



California State University Risk Management Authority  
 Auxiliary Organizations Risk Management Alliance

## 2013 CSURMA • AORMA MEETING CALENDAR

JANUARY, 2013		FEBRUARY, 2013		MARCH, 2013	
3	PC: Teleconference, 2:00 p.m.	4	MSLCTC: Teleconference, 11:00 a.m.	21	AORMA: <b>Newport Beach, 9:00 a.m.</b>
				21	EC: <b>Newport Beach, 2:30 p.m.</b>
				22	EC LRP: <b>Newport Beach, 8:00 a.m.</b>
					<b>Only the AORMA Chair and Vice Chair attend the EC meetings</b>
					<b>Only the AORMA Chair attends to AOA EC meeting</b>
APRIL, 2013		MAY, 2013		JUNE, 2013	
18	PC: Teleconference, 2:00 p.m.	9	AORMA: Long Beach, 10:00 a.m.	3	MSLCTC: Teleconference, 11:00 a.m.
		9	EC: Long Beach, 4:00 p.m.	6	PC: Teleconference, 2:00pm
		10	EC: Long Beach, 8:00 a.m.		
		10	BOD: Long Beach, 10:30 a.m.		
			<b>Only the AORMA Chair and Vice Chair attend the EC meetings</b>		
			<b>All AORMA Committee members attend the BOD</b>		

AORMA = Auxiliary Organizations Risk Management Alliance Committee	PC = AORMA Programs Committee	EC = CSURMA Executive Committee
AOUIT = Auxiliary Organizations Unemployment Insurance Trust	AORMA LRP = AORMA Long Range Planning Meeting	EC LRP = EC Long Range Planning Meeting
MSLCTC = AORMA Member Services, Loss Control & Training Committee	AOA = CSU Auxiliary Organizations Association	BOD = CSURMA Board of Directors



California State University Risk Management Authority  
 Auxiliary Organizations Risk Management Alliance

## 2013 CSURMA • AORMA MEETING CALENDAR

JULY, 2013	AUGUST, 2013	SEPTEMBER, 2013
<p>10-11 <b>AORMA Officers Retreat</b></p> <p><b>Only the AORMA Chair, Vice Chair, Past Chair and Ex Officio attend the AORMA Officers Retreat</b></p>	<p>1 PC: Teleconference, 2:00 p.m.            26 MSLCTC: Teleconference, 11:00 a.m.</p>	<p>11 AORMA New Committee Member Orientation: San Francisco, 9:00 a.m.            11 AORMA LRP: San Francisco, 10:00 a.m.            12 AORMA: San Francisco, 9:00 a.m.            12 EC Orientation: San Francisco, 4:00 p.m.            13 EC: San Francisco, 8:30 a.m.</p> <p><b>Only the AORMA Chair and Vice Chair attend the EC meetings</b></p>
OCTOBER, 2013	NOVEMBER, 2013	DECEMBER, 2013
<p>3 PC: Teleconference, 2:00 p.m.            24 <b>AORMA: Newport Beach, 10:00 a.m.</b>            25 <del>EC: Long Beach, 9:00 a.m.</del>            25 BOD: Long Beach, 10:30 a.m.</p> <p><b>Only the AORMA Chair and Vice Chair attend the EC meetings</b></p> <p><b>All AORMA Committee members attend the BOD</b></p>	<p>18 MSLCTC: Teleconference, 11:00 a.m.            6 <b>EC: Sacramento, 1:00 p.m.</b>            6 <b>BOD: Sacramento, 3:30 p.m.</b>            7-8 <b>FTPT Conference, Sacramento, CA</b></p>	<p>5 AORMA: San Francisco, 10:00 a.m.            6 <del>EC: San Francisco, 8:30 a.m.</del>            12 PC: Teleconference, 2:00 p.m.</p> <p><b>Only the AORMA Chair and Vice Chair attend the EC meetings</b></p>

AORMA = Auxiliary Organizations Risk Management Alliance Committee	PC = AORMA Programs Committee	EC = CSURMA Executive Committee
AOUIT = Auxiliary Organizations Unemployment Insurance Trust	AORMA LRP = AORMA Long Range Planning Meeting	EC LRP = EC Long Range Planning Meeting
MSLCTC = AORMA Member Services, Loss Control & Training Committee	AOA = CSU Auxiliary Organizations Association	BOD = CSURMA Board of Directors

**CSURMA AORMA COMMITTEE CONTACT LIST**

**ISSUE:** Attached for the Committee's review are the AORMA Committee and Standing Committee Membership Roster effective July 1, 2013.

**RECOMMENDATION:** It is recommended that the Committee Members review the contact information for accuracy and report any changes or corrections to Staff.

**FISCAL IMPACT:** None.

**BACKGROUND:** Contact lists are provided at every meeting.

**PUBLICATION:** None.

**ATTACHMENT(S):**

- a. AORMA Committee and Standing Committee Membership Roster - Effective at 7-01-13

**AORMA Committee**  
**Ten voting members - two alternates - twelve members total**  
**Effective at July 1, 2013**

Committee	Seat	Member	Position	Campus	Type of Auxiliary	E-Mail	Telephone Number
AORMA	Chair	Dwayne Brummett	Director of Business Services	San Luis Obispo	Associated Students, Inc., Cal Poly San Luis Obispo	dbrummet@calpoly.edu	805-756-5768
AORMA	Vice Chair	Robert de Wit	Chief Financial Officer	Long Beach	Forty-Niner Shops, Inc., CSU Long Beach	rdewit@csulb.edu	562-985-5549
AORMA	Past Chair	Kurt Borsting	Director, Titan Student Centers	Fullerton	Associated Students, California State University, Fullerton, Inc.	kborsting@fullerton.edu	657-278-4214
AORMA	Ex Officio	Pat Worley	Executive Director	Sacramento	Associated Students of California State University, Sacramento	pcworley@csus.edu	916-278-7290
AORMA	At Large	Brian Nowlin	Chief Operating Officer	Long Beach	California State University, Long Beach Research Foundation	Brian.Nowlin@csulb.edu	562-985-4690
AORMA	At Large	Frank Mumford	Executive Director	Fullerton	CSU Fullerton Auxiliary Services Corporation	fmumford@fullerton.edu	657-278-4101
AORMA	At Large	Gigi Kiama	Human Resources Manager	Monterey Bay	The University Corporation at Monterey Bay	gkiama@csumb.edu	831-582-4301
AORMA	At Large	Guy Dalpe	Managing Director	San Francisco	Cesar Chavez Student Center, San Francisco State University	gdalpe@sfsu.edu	415-338-1044
AORMA	At Large	Leslie Davis	Executive Director	Sacramento	University Union Operation of CSUS, Inc.	leslied@saclink.csus.edu	916-278-2904
AORMA	At Large	Keith Kompsi	Director, Foundation Financial Services	Fresno	Fresno Association, Inc., CSU Fresno	kkompsi@csufresno.edu	559-278-0838
AORMA	At Large	Haleh Minakary	General Business Manager	Pomona	The Cal Poly Pomona Foundation, Inc.	hminakary@csupomona.edu	909-869-2910
AORMA	At Large	Melinda Coil	Chief Financial Officer	San Diego	San Diego State University Research Foundation	mcoil@foundation.sdsu.edu	619-594-1076

**Member Services, Loss Control & Training Committee**  
**Minimum of five members - at least two of whom are AORMA Committee members**

Committee	Seat	Member	Position	Campus	Type of Auxiliary	E-Mail	Telephone Number
MSLCTC	Chair	Dwayne Brummett	Director of Business Services	San Luis Obispo	Associated Students, Inc., Cal Poly San Luis Obispo	dbrummet@calpoly.edu	805-756-5768
MSLCTC	At Large	Kristin Kelly	Associate Director	San Jose	The Student Union of San Jose State University	kristin.kelly@sjsu.edu	408-924-6315
MSLCTC	At Large	Peter Neville	Executive Director	Sonoma	Sonoma Student Union Corporation	peter.neville@sonoma.edu	707-664-2780
MSLCTC	At Large	Arnecia Bryant	Associate Director, Operations	Dominguez Hills	The Donald P. and Katherine B. Loker University Student Union, Inc.	abryant@csudh.edu	310-243-3854
MSLCTC	At Large	Dennis Miller	Director, Employment Services	Pomona	The Cal Poly Pomona Foundation, Inc.	dennismiller@csupomona.edu	909-869-2958
MSLCTC	At Large	Raven Tyson	Contracts & Risk Management Coordinator	San Diego	Associated Students of San Diego State University	raven.tyson@sdsu.edu	619-594-3760

**Programs Committee**  
**Minimum of five members - at least two of whom are AORMA Committee members**

Committee	Seat	Member	Position	Campus	Type of Auxiliary	E-Mail	Telephone Number
PC	Chair	Guy Dalpe	Managing Director	San Francisco	Cesar Chavez Student Center, San Francisco State University	gdalpe@sfsu.edu	415-338-1044
PC	At Large	Kurt Borsting	Director, Titan Student Centers	Fullerton	Associated Students, California State University, Fullerton, Inc.	kborsting@fullerton.edu	657-278-4214
PC	At Large	Gigi Kiama	Human Resources Manager	Monterey Bay	University Corporation, CSU Monterey Bay	gkiama@csumb.edu	831-582-4301
PC	At Large	Mark Day	Executive Director	San Bernardino	Santos Manuel Student Union of California State University, San Bernardino	mday@csusb.edu	909-537-7201
PC	At Large	Haleh Minakary	General Business Manager	Pomona	The Cal Poly Pomona Foundation, Inc.	hminakary@csupomona.edu	909-869-2910

**AOUI Board of Trustees / Unemployment Insurance Program Task Group**  
**Five members**

Committee	Seat	Member	Position	Campus	Type of Auxiliary	E-Mail	Telephone Number
AOUI	Chair	Guy Dalpe	Managing Director	San Francisco	Cesar Chavez Student Center, San Francisco State University	gdalpe@sfsu.edu	415-338-1044
AOUI	Treasurer	Kim Clark	Executive Director	San Marcos	University Corporation	kclark@csusm.edu	760-750-3722
AOUI	Secretary	Kristin Kelly	Associate Director	San Jose	The Student Union of San Jose State University	kristin.kelly@sjsu.edu	408-924-6315
AOUI	Trustee	Heidi Chien	Associate Executive Director	Humboldt	Humboldt State University Center, Board of Directors	heidi.chien@humboldt.edu	707-826-5984
AOUI	Trustee	Joe Illuminate	Associate Director	Northridge	University Student Union of California State University, Northridge	joe.illuminate@csun.edu	818-677-3615

*AORMA Committee Chair serves for a period of four years - Vice Chair, to Chair, to Past President, to Ex-Officio.*

*Standing Committee Chair serves a one-year term, is appointed by the AORMA Committee Chair, and must be an AORMA Committee member.*

*AORMA Committee and Standing Committee members may serve a maximum of three consecutive two-year terms (total six years).*

Size of Campus: small - less than 10,000 FTE; medium - between 10,000 and 20,000 FTE; large - more than 20,000 FTE