



California Sanitation Risk Management Authority  
c/o ALLIANT INSURANCE SERVICES, INC.  
560 Mission Street, 6th Floor, San Francisco, CA 94105

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**OFFICERS:**

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**PAST PRESIDENTS:**

Craig Murray  
2020-2024  
Greg Baatrup  
2018-2020

## WORKERS' COMPENSATION COMMITTEE AGENDA

Meeting Via Teleconference at the Following Locations:

1832 Montecito Way, Eureka, CA 95501

Phone One-Tap: +16694449171,,93502316388#,,,\*035284#

<https://alliantinsurance.zoom.us/j/93502316388?pwd=VTQzlfmnhN242mx5b33lCuZKLLR8TU.1>

Date: Thursday, February 19, 2026

Time: 1:00 PM [Lunch at Noon]

LOCATION: Alliant Offices  
560 Mission Street, 6th Floor  
San Francisco, CA 94105

**A. CALL TO ORDER**

A=Action

**B. PUBLIC AND COMMITTEE MEMBER COMMENTS**

I=Information

**C. CONSENT CALENDAR**

V=Verbal

1. Meeting Minutes of October 15, 2025

H=Handout

*Recommendation: Approve minutes from their last meeting.*

A p. 6

**D. CLOSED SESSION TO DISCUSS PENDING CLAIMS**

A

Action may be taken per Government Code Section 54956.95.

See Reverse for Full Listing of Claims to be Discussed

**E. CLAIMS ADMINISTRATION**

A/V

1. Reporting and Ratification of Claims Settlements

*Recommendation: Report and ratify claims settlements approved in closed session.*

I p. 13

2. Quarterly Claims Report as of December 31, 2025

*Recommendation: Review the quarterly claims report as of 12/31/25.*

V

3. Athens Administrators Contract Renewal

*Recommendation: Discuss renewal of the Athens Administrators agreement and provide direction.*

**F. UNDERWRITING ISSUES**

V

1. Program Year 37 Renewal Preliminary Expectations

*Recommendation: Receive a verbal report regarding the Program Year 36 Renewal Preliminary Expectations.*

**G. LOSS CONTROL**

I p. 14

1. Safety / Loss Control and Wellness Reimbursements

*Recommendation: Review the safety / loss control and wellness reimbursement checks issued since the last meeting.*

I/H p. 18

2. Annual Workers' Compensation Loss Analysis Report

*Recommendation: Review the Workers Compensation Program Claims Analysis Report.*

A p. 23

3. FY 26/28 Risk Control Work Plan - Draft

*Recommendation: Review the proposed FY 26/28 Risk Control Work Plan and provide direction.*

A p. 33

4. Workers' Compensation Excellence Award Criteria

*Recommendation: Review the 2026 Workers' Compensation Excellence Award Criteria and provide direction.*

A p. 44

5. Workers' Compensation Excellence Award - Castro Valley Sanitary District

*Recommendation: Review the 2026 Workers' Compensation Excellence Award submission for Castro Valley Sanitary District.*

**H. INFORMATION ITEMS**

I p. 45

1. "Poem of the Day"

I p. 47

2. Article - You Chose a TPA That Delivers Where It Counts Athens DWC Audit Performance

I p. 51

3. Article - OSHA Issues LOI on Recording Workplace Injuries Related to Lithium-Ion Batteries

I p. 53

4. Article - New NCCI Analysis Reveals Shift in Large Claim Emergence Patterns

I p. 55

5. CSRMA 2026 Meeting Calendar

I p. 56

6. CSRMA Organization Chart

I p. 57

7. CSRMA Service Team

*The Committee will be asked to review the Information Items.*

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## I. ADJOURNMENT

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*The next meeting is scheduled for May 14, 2026 via videoconference*

*Per Government Code section 54954.2, persons requesting disability-related modifications or accommodations, including auxiliary aids or services in order to participate in the meeting, are requested to contact Alliant at (415) 403-1400 twenty-four hours in advance of the meeting. Entrance to the meeting location requires routine provision of identification to building security. However, CSRMA does not require any member of the public to register his or her name, or to provide other information, as a condition to attendance at any public meeting and will not inquire of building security concerning information so provided. See Government Code section 54953.3.*

**CSRMA WORKERS' COMPENSATION PROGRAM**

**CLAIMS INCURRED AS OF 02.01.26**

| <b>Claimant Name</b> | <b>Account Name</b>                               | <b>Loss Date</b> |
|----------------------|---|------------------|
| <b>INDEMNITY</b>     |   |                  |
| Acosta, Gilbert      | Lake Arrowhead Community Services District        | 05/12/2022       |
| Alejos, Sylvia       | Silicon Valley Clean Water                        | 10/19/2022       |
| Alejos, Sylvia       | Silicon Valley Clean Water                        | 08/17/2021       |
| Alexander, Jeffrey   | Delta Diablo                                      | 02/05/2025       |
| Baggerly, Russ       | Ojai Valley Sanitary District                     | 12/17/2018       |
| Baxter, Kenneth      | Dublin San Ramon Services District                | 03/01/2021       |
| Carrera, Benjamin    | Victor Valley Wastewater Reclamation Authority    | 11/04/2019       |
| Chavarela, Jesse     | Santa Margarita Water District                    | 02/21/2023       |
| Covarrubias, Jose    | Napa Sanitation District                          | 11/14/2024       |
| Egan, Mark           | Napa Sanitation District                          | 04/10/2021       |
| Espinoza, Gilbert    | Castro Valley Sanitary District                   | 04/15/2025       |
| Ford, Thomas         | Central Contra Costa Sanitary District            | 08/13/2019       |
| Gallaher, Raymond    | Ventura Regional Sanitation District              | 02/24/2019       |
| Gray, Mark           | South Tahoe Public Utility District               | 02/06/2015       |
| Griewe, Adam         | Santa Margarita Water District                    | 10/05/2020       |
| Herrera, Jason       | Silicon Valley Clean Water                        | 04/21/2021       |
| Hill, Nathan         | Central Contra Costa Sanitary District            | 11/06/2024       |
| Hughes, Tim          | Union Sanitary District                           | 02/03/2024       |
| Hughes, Timothy      | Union Sanitary District                           | 09/10/2024       |
| Hunsaker, James      | Victor Valley Wastewater Reclamation Authority    | 07/13/2022       |
| Kiser, Paul          | Napa Sanitation District                          | 04/10/2025       |
| Kupel, Nora          | West Valley Sanitation District                   | 10/21/2013       |
| Laucirica, Leon      | Ironhouse Sanitary District                       | 03/03/2021       |
| Lucia, Jesse         | Central Contra Costa Sanitary District            | 01/18/2024       |
| Lucia, Jesse         | Central Contra Costa Sanitary District            | 06/30/2025       |
| Luis, Paul           | West Valley Sanitation District                   | 05/16/2025       |
| Mayor, Joseph        | Ross Valley Sanitary District                     | 12/08/2013       |
| McDuffie, Jacqueline | Delta Diablo                                      | 07/22/2022       |
| Medina, Estevan      | Monterey Water One                                | 03/24/2025       |
| Miller, Tricia       | Selma Kingsbury Fowler County Sanitation District | 09/23/2025       |
| Morales, Hugo        | Monterey Water One                                | 11/16/2022       |
| Mosing, James        | Fairfield/Suisun Sewer District                   | 07/20/2021       |
| Pearson, Derrick     | Dublin San Ramon Services District                | 05/16/2022       |
| Petersen, Blake      | Central Marin Sanitation Agency                   | 08/30/2023       |
| Pimm, Michael        | Central Marin Sanitation Agency                   | 03/16/2022       |
| Proschold, Darrell   | Ross Valley Sanitary District                     | 10/01/2024       |
| Proschold, Darrell   | Ross Valley Sanitary District                     | 12/10/2024       |
| Sandoval, Ruperto    | West Bay Sanitary District                        | 12/02/2024       |
| Sargiotto, Sean      | Dublin San Ramon Services District                | 08/14/2025       |
| Smith, Michael       | Tahoe Truckee Sanitation Agency                   | 09/08/2022       |
| Valdez, Ivan         | Santa Margarita Water District                    | 02/06/2023       |
| Valikonis, John      | Carpinteria Sanitary District                     | 08/30/2024       |
| Villafana, Miguel    | Montecito Sanitary District                       | 12/27/2024       |
| Woolwine, Dwight     | Ojai Valley Sanitary District                     | 12/06/2024       |
| Wright, Robert       | Delta Diablo                                      | 09/01/2018       |

## CSRMA WORKERS' COMPENSATION PROGRAM

CLAIMS INCURRED AS OF 02.01.26

| Claimant Name         | Account Name                                      | Loss Date  |
|-----------------------|---|------------|
| <b>FUTURE MEDICAL</b> |   |            |
| Alsbury, Jay          | South Tahoe Public Utility District               | 04/23/1999 |
| Alsbury, Jay          | South Tahoe Public Utility District               | 05/05/2008 |
| Anderson, Frederick   | Silicon Valley Clean Water                        | 11/21/2021 |
| Armstrong, Albert     | West Valley Sanitation District                   | 11/10/1998 |
| Ayers, James          | Vallejo Flood and Wastewater District             | 09/11/2002 |
| Bally, Robert         | Central Marin Sanitation Agency                   | 08/20/2020 |
| Benitez, Victor       | Ironhouse Sanitary District                       | 03/31/2016 |
| Bish, Mark            | West County Wastewater District                   | 05/12/2015 |
| Brough, Robert        | Dublin San Ramon Services District                | 07/28/2016 |
| Comito, Anthony       | Montecito Sanitary District                       | 11/16/1995 |
| Dimalanta, Cornelia   | Fairfield/Suisun Sewer District                   | 07/25/2023 |
| Dincau, Dustin        | Ventura Regional Sanitation District              | 01/10/2018 |
| Dugan, Jodey          | Santa Margarita Water District                    | 03/28/2007 |
| Eastland, Jerry       | Delta Diablo                                      | 05/15/2015 |
| Fiore, Alan           | Central Marin Sanitation Agency                   | 05/24/2016 |
| Flanders, Dolores     | Central Contra Costa Sanitary District            | 04/16/2009 |
| Ford Sr, Thomas       | Central Contra Costa Sanitary District            | 06/22/2009 |
| Freitas, Ronald       | Dublin San Ramon Services District                | 11/09/2015 |
| Godinez, Ignacio      | Ventura Regional Sanitation District              | 09/06/2010 |
| Golshani, Sahar       | Las Gallinas Valley Sanitation District           | 10/30/2023 |
| Gonzales, Frank       | Carpinteria Sanitary District                     | 06/19/2001 |
| Grabowski, Mathew     | Union Sanitary District                           | 11/09/2015 |
| Gregory, Leonard      | Union Sanitary District                           | 09/10/1993 |
| Hernandez, Ralph      | Delta Diablo                                      | 04/17/1997 |
| Horton, Cristina      | Dublin San Ramon Services District                | 11/11/2019 |
| Inman, Erin           | Ventura Regional Sanitation District              | 05/06/2014 |
| James, Gregory        | South Tahoe Public Utility District               | 08/18/2015 |
| Jannings, Andrew      | Vallejo Flood and Wastewater District             | 10/27/2010 |
| Jones, Lorine         | Silicon Valley Clean Water                        | 10/05/2005 |
| Kaur, Akusha          | Selma Kingsbury Fowler County Sanitation District | 07/09/2024 |
| Keeton, Bonnie        | Central Contra Costa Sanitary District            | 05/17/2014 |
| Kurz, Charles         | Dublin San Ramon Services District                | 01/17/2001 |
| Lawhon, Lance         | Carpinteria Sanitary District                     | 09/09/2022 |
| Lofgren, Russell      | Delta Diablo                                      | 11/25/1997 |
| Lucia, Jesse          | Central Contra Costa Sanitary District            | 06/10/2020 |
| Marin, James          | Union Sanitary District                           | 11/01/1990 |
| Martinez, David       | Central Contra Costa Sanitary District            | 10/10/2015 |
| Moore, James          | Ironhouse Sanitary District                       | 11/25/2015 |
| Moore, Paul           | Vallejo Flood and Wastewater District             | 04/23/2007 |
| Myers, Charles        | West County Wastewater District                   | 06/14/2016 |
| Plascencia, Jose      | Central Contra Costa Sanitary District            | 04/19/2022 |
| Potter, Timothy       | Central Contra Costa Sanitary District            | 02/27/2007 |
| Potter, Timothy       | Central Contra Costa Sanitary District            | 04/11/2018 |
| Prentice, Robert      | Santa Margarita Water District                    | 10/14/2022 |
| Prieto, Tony          | South Tahoe Public Utility District               | 10/12/2004 |
| Raphael, Zandra       | Delta Diablo                                      | 02/11/2010 |
| Rojo, Jamie           | Union Sanitary District                           | 09/24/2020 |
| Rubio, Francis        | Fairfield/Suisun Sewer District                   | 10/10/2023 |

**CSRMA WORKERS' COMPENSATION PROGRAM****CLAIMS INCURRED AS OF 02.01.26**

| <b>Claimant Name</b> | <b>Account Name</b>                    | <b>Loss Date</b> |
|----------------------|--|------------------|
| Schmidt, Christian   | Carmel Area Wastewater District        | 04/15/2020       |
| Sharp, Noah          | Ojai Valley Sanitary District          | 08/27/2024       |
| Smith, David         | Ironhouse Sanitary District            | 04/09/2012       |
| Solari, Tom          | Union Sanitary District                | 08/24/2020       |
| Strickland, David    | South Tahoe Public Utility District    | 08/25/1998       |
| Tarnowski, Allen     | Union Sanitary District                | 11/07/2016       |
| Tarnowski, Allen     | Union Sanitary District                | 10/03/2018       |
| Tyler, Alan          | Santa Margarita Water District         | 04/24/2019       |
| Van Horn, James      | Carmel Area Wastewater District        | 08/04/2011       |
| Vasut, Victor        | Union Sanitary District                | 11/26/2011       |
| Whitman, Joshua      | Central Contra Costa Sanitary District | 07/19/2017       |
| Wilkinson, Edward    | South Tahoe Public Utility District    | 01/24/2014       |
| Wright, Robert       | Delta Diablo                           | 04/09/2013       |

**MINUTES OF THE  
WORKERS' COMPENSATION COMMITTEE MEETING  
TELECONFERENCE  
OCTOBER 15, 2025**

**MEMBERS PRESENT**

Mr. Tyson Zimmerman, Chair, Ironhouse Sanitary District  
Ms. Jennifer Sabine, Encina Wastewater Authority  
Ms. Jan Lee, Dublin San Ramon Services District (arrived 1:35 p.m.)  
Mr. Matt Anderson, Silicon Valley Clean Water  
Mr. Erik Brown, Novato Sanitary District

**MEMBERS ABSENT**

Mr. Jeffrey Kingston, Sausalito-Marin City Sanitary District

**GUESTS AND CONSULTANTS PRESENT**

Mr. Seth Cole, Alliant Insurance Services, Inc.  
Mr. P. J. Skarlanic, Alliant Insurance Services, Inc.  
Mr. Myron Leavell, Alliant Insurance Services, Inc.  
Mr. Steve Davidson, Alliant Insurance Services, Inc.  
Mr. Logan Carter, Alliant Insurance Services, Inc.  
Mr. David Patzer, DKF Solutions Group  
Ms. Heather Truro, HT Consulting  
Ms. Stella Sebastiani, Athens Administrators  
Mr. Manuel Berumen, Athens Administrators  
Ms. Sunny White, Athens Administrators  
Ms. Nicole Toutjian, Athens Administrators  
Mr. Don Freeman, Sentinel Occupational Software (left 1:52 p.m.)  
Ms. Michelle Kersten, Sentinel Occupational Software (left 1:52 p.m.)

**A. CALL TO ORDER**

The meeting was called to order by Chair Tyson Zimmerman at 1:07 p.m.

**B. PUBLIC & COMMITTEE MEMBER COMMENTS**

There was a round of introductions.

**C. CONSENT CALENDAR**

**C.1. Meeting Minutes – May 15, 2025**

The meeting minutes of May 15, 2025 were reviewed.

A motion was made to approve the meeting minutes as presented.

**MOTION:** Erik Brown

**SECOND:** Jennifer Sabine

**MOTION CARRIED**

**AYES:** Anderson, Brown, Sabine, Zimmerman

**NAYS:** None

**ABSTAIN:** None

**ABSENT:** Kingston, Lee

## **C.2. Proposed 2026 Meeting Calendar**

The proposed meeting calendar for 2026 was reviewed. The Committee will hold one in person meeting and two via Zoom teleconference. The February 19, 2026 meeting will be held in person at the Alliant San Francisco office. Each meeting will be scheduled to begin at 1:00 p.m. Committee members were requested to advise the Program Administrators of any potential scheduling conflicts. No known conflicts were noted.

A motion was made to accept the proposed meeting calendar as presented.

**MOTION:** Matt Anderson

**SECOND:** Erik Brown

**MOTION CARRIED**

**AYES:** Anderson, Brown, Sabine, Zimmerman

**NAYS:** None

**ABSTAIN:** None

**ABSENT:** Kingston, Lee

## **D. CLOSED SESSION TO DISCUSS PENDING CLAIMS**

The Committee entered Closed Session at 1:10 p.m. pursuant to Government Code Section 54956.95. The Committee left Closed Session at 1:25 p.m., at which time it was announced that the claims administrator was provided with direction concerning the disposition of certain claims; however, no final settlements were approved, nor was any action taken.

## **E. CLAIMS ADMINISTRATION**

### **E.1. Reporting and Ratification of Claims Settlements**

None.

### **E.2. Quarterly Claims Report as of September 30, 2025**

Seth Cole reviewed the Quarterly Claims Report with the Committee. He reported that at the end of the first quarter of the current program year, claims were trending at a 28.23% loss ratio; compared to the 5-year average of 35.97%, and 57.39% over the program's history. Seth advised that Workers'

Compensation claims have potential to develop into greater losses after the conclusion of the Program Year in which they occurred, thereby increasing the corresponding loss ratios, but a 28.23% loss ratio at the conclusion of a Program Year would be indicative of a favorable year for the Program.

Seth advised that claims frequency is trending downwards, but severity is trending upwards. Total dollars paid in claims is slightly upwards for CSRMA and across the Workers' Compensation industry, though CSRMA's loss ratio is outperforming the industry.

### **E.3. Sentinel Update/Presentation**

Don Freeman and Michelle Kersten from Sentinel Occupational Software presented to the Committee. Sentinel provides CSRMA claims benchmarking services to identify outliers in medical and temporary disability costs as well as a portal for members that facilitates the early return to work for injured workers. Don highlighted common problems facing Workers' Compensation pools and corresponding solutions. He spoke about Sentinel's new Return to Work features, implementation across the Workers' Compensation Program membership, and Sentinel's coordinated efforts with Athens Administrators.

Don also described how, using AI assistance, Sentinel has developed tools to identify temporary alternative duties based on injured employees' doctors' orders and based on the employees' respective positions. Sentinel's tools incorporate new information on injured employees' cases to update each individual Return to Work plan.

### **E.4. Athens Stewardship Report**

Seth Cole introduced the item to the Committee. Athens Administrators provides a stewardship report for the CSRMA Workers' Compensation Committee annually, summarizing the Program's claims activity.

Sunny White from Athens Administrators reviewed the Report with the Committee. Sunny highlighted the progress that Athens has made with respect to the Program's indemnity closing ratio, which is the expressed as a percentage of claims closed within a given policy year, regardless of when they were entered, versus the number of claims opened in that same year. In the 2024-25 policy period, 52 claims were closed and 32 were opened, giving an indemnity closing ratio of 133%.

Sunny then reviewed the total Program payouts over the last two years of the Program, which revealed a 19.6% increase in total payouts. Contributing largely to this increase was a noteworthy change in Temporary Disability, from approximately \$317k in 2023-24 to \$722k in 2024-25. Sunny advised that the significant increase are anomalies resulting from miscalculations of benefits by the Program's previous third-party claims administrator. Because many of the corrections were paid during the 2024-25 Program year, the anomalies were included in this year's stewardship report.

Manuel Berumen reviewed Athens' settlements summary. In 2024-25, a 45% increase in settlements was reported. Several of the largest Compromise & Release settlements achieved during the Program Year were celebrated as achievements by the Administrators, as C&R settlements closes out future exposure for Future Medical expenses.

Manual also reviewed the Program's outstanding liabilities, advising that the total outstanding liabilities increased in 2024-25 by approximately 2%, due to a small number of severe claims reported during the Program Year.

Manual gave an overview of Athens' virtual claims assistant, Jarvis. Jarvis is provided at no additional cost to CSRMA, and it allows injured employees to interact with their claims handlers by uploading documents, booking appointments, keeping up on employee sentiment, and messaging with the claims handler. Athens invited 86 injured employees to enroll in Jarvis in 2024-25, and 32 of those registered.

## **F. UNDERWRITING ISSUES**

### **F.1. WC Payroll Audit PY 35 (2024-2025)**

Seth Cole reviewed the Program Year 35 payroll audit with the Committee. Based on the annually conducted audit results, members will either receive a return check or invoice for any additional deposit due. Overall, \$127,301 will be returned to the membership.

Seth advised that the Program Administrators follow the Workers' Compensation Insurance Rating Bureau (WCIRB) guidelines on remuneration for the initial deposit calculation (pool deposit) and the payroll audit.

## **G. LOSS CONTROL**

### **G.1. Safety/Loss Control and Wellness Reimbursements**

David Patzer directed the Committee to page 45 of the agenda for a summary of requests received since the last meeting. There have been 48 reimbursement requests since the last time the Committee met. David reported that a majority of the requests normally come in during the months of May and June.

David advised that the programs are very well utilized, and that each request is vetted for suitability and alignment with the intentions of the programs. If a request is not in line with the intentions of the program, the Risk Control Advisor and the Program Administrators attempt to work with the requesting agency to find a solution that does align with the program.

### **G.2. Workers' Compensation Excellence Awards**

David Patzer reviewed this item with the Committee. The CSRMA Workers' Compensation Excellence Award P&P #3-WC indicates the Workers' Compensation Committee review applications submitted each year and provide recommendations to the Executive Board on the applications meeting the criteria set forth in the P&P.

The three applications that were submitted all met the required criteria after some additional follow-up and clarification. David reviewed the applications with the Committee and is recommending that the following members receive the 2025 Workers' Compensation Excellence Award:

- Ross Valley Sanitary District

- Mt. View Sanitary District
- Fairfield-Suisun Sewer District

David remarked that the application is quite rigorous and congratulated the winning agencies for their work in completing their applications.

The winning agencies will each receive a lobby banner and plaque, with employees of all winning agencies receiving an equal share of a \$50,000 prize, which is the approximate cost of a preventable back injury. The limit for a prize for any one employee is \$499.

A motion was made to recommend the slate of winning agencies to the Executive Board for their review and presentation of the 2025 Workers' Compensation Excellence Awards.

**MOTION:** Jennifer Sabine

**SECOND:** Jan Lee

**MOTION CARRIED**

**AYES:** Anderson, Brown, Lee, Sabine, Zimmerman

**NAYS:** None

**ABSTAIN:** None

**ABSENT:** Kingston

### G.3. Fall/Winter 2025 Area Training Update

David Patzer directed the Committee's attention to page 57 of the agenda for a listing of upcoming trainings, noted below:

| Topic  | Tentative Dates | Tentative Locations |
|--|-----------------|---------------------|
| <b>Sentinel Training Program for WC members</b>  | Ongoing         | Zoom                |
| <b>Sewer Summit</b>  | October 9       | Virtual conference  |
| <b>Webinars Scheduled To Date:</b>   | September-Jan   | Webinars            |
| 8/27/25 Small Water Systems Drinking Water Rules   |                 |                     |
| 8/28/25 Job Hazard Analysis - Your Safety Super Tool   |                 |                     |
| 9/2/25 Underground Utility Locator   |                 |                     |
| 9/3/25 WeTip and CSRMA   |                 |                     |
| 9/4/25 Lone Worker Best Practices: How to Keep Lone Rangers Safe When There Isn't a Tonto                      |                 |                     |
| 9/11/25 Combination Hydro-Vac & CCTV Inspection Unit - Strategies for Safe and Efficient Use (Heavy Equipment) |                 |                     |
| 9/23/25 Sewer Backup Response: Reducing Liability and Responding Professionally                                |                 |                     |
| 9/25/25 SERP Services: Sewer Spill Help Hotline and SWRCB Training Membership                                  |                 |                     |
| 10/16/25 Effective Tailgate Safety Meetings/Trainings  |                 |                     |
| 10/23/25 What Supervisors Need to Know About Workers' Compensation to Avoid Legal Pitfalls                     |                 |                     |

|          |  |
|----------|--|
| 10/28/25 | Soft Tissue Injury Prevention for PW/Water/Wastewater Workers - Part I   |
| 11/4/25  | KnowledgeVine- Leveraging Technology to Create a Sustainable Safety Culture.   |
| 11/6/25  | How To ID and Classify Confined Spaces for Wastewater Workers  |
| 11/11/25 | Ergonomics in Action: Preventing Injuries Through Smarter Work Practices   |
| 11/13/25 | CalOSHA Inspections: Survival Planning and Tips  |
| 11/18/25 | From Chlorination to UV: Disinfection in Wastewater Treatment  |
| 11/20/25 | Are You Prepared for Bypass Pumping  |
| 12/10/25 | The Importance of Documentation, Reports, and SCADA  |
| 12/17/25 | Drinking Water Disinfection  |
| 1/6/26   | CalOSHA Inspection and Serious Injury Reporting - Understanding and Knowing Your Responsibilities. Rights and Requirements |
| 1/13/26  | Sludge Thickening, Digestion, and Dewatering: Solids Handling in Wastewater Treatment                                      |
| 1/13/26  | Dog Bite Prevention for Public Works and Water Utility Employees   |
| 1/21/26  | Supervising for Safety: Coaching Teams to Prevent Soft Tissue Injuries   |

The Sewer & Stormwater Summit was held virtually the week before the meeting. Five learning tracks were available for participants, and over 200 individuals attended the Summit. CSRMA, Plan JPA, NCCSIF and SCORE all co-sponsored the event.

#### **G.4. 2-Year Risk Control Work Plan**

David Patzer reviewed the Risk Control Work Plan process with the Committee. Every year between late November and early December, the Risk Control Subcommittee, which is made up of the chairs of the Workers' Compensation Committee and the Pooled Liability Committee, meets with the Risk Control Advisor, to update the rolling 2-year Risk Control Work Plan.

David encouraged the Committee to share ideas to be considered for the Work Plan with either David, Tyson Zimmerman, or anyone from the Program Administrators for consideration by the Risk Control Subcommittee. The Risk Control Subcommittee will meet sometime around the Thanksgiving holiday, where any suggestions provided by Committee members will be reviewed. A draft of the work plan will be brought to each Committee to review, comment, and make additional recommendations. Once both Committees review the Plan, it will be taken to the Executive Board in March for approval at their Long-Range Planning Session. The Plan will then be finalized and brought back to both Committees for review.

#### **H. INFORMATION ITEMS**

##### **H.1. *Poem of the Day***

##### **H.2. Information – Athens Claims Team Contacts**

##### **H.3. Article – *Medical Cost Containment in Catastrophic Claims a Balancing Act* – carrierchronicles.com**

**H.4. Article – Workplace injuries cost US businesses over \$58B a year**

**H.5. CSRMA 2025 Meeting Calendar**

**H.6. CSRMA Organizational Chart**

**H.7. CSRMA Service Team Chart**

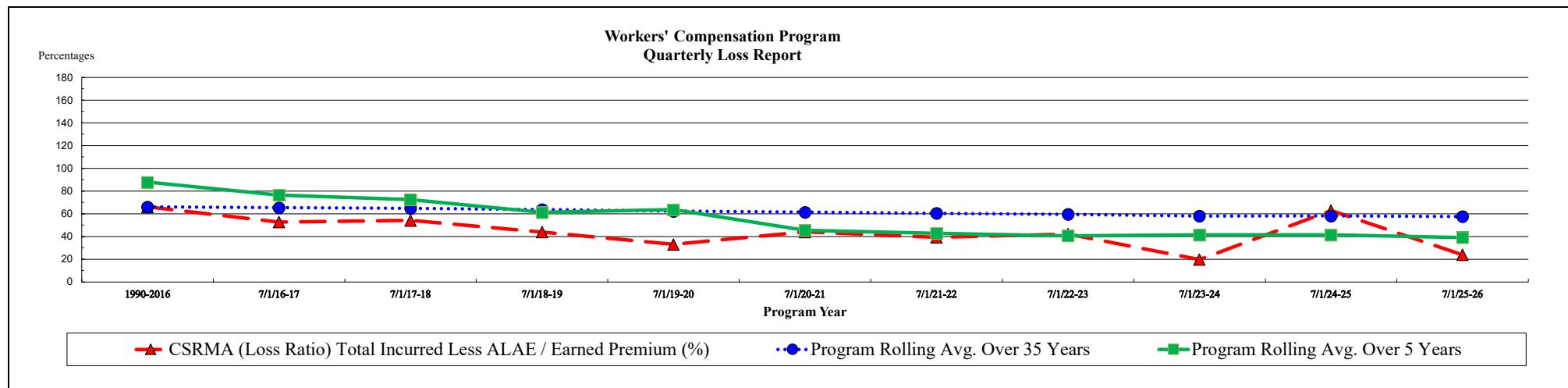
The Committee reviewed the presented information items.

**I. ADJOURNMENT**

The meeting was adjourned at 2:32 p.m. The next meeting is scheduled for February 19, 2026 in Alliant's San Francisco office.

| WORKERS' COMPENSATION PROGRAM                                    |            |           |           |           |           |           |           |           |           |           |           |            |
|--|------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| Quarterly Claims Report  |            |           |           |           |           |           |           |           |           |           |           |            |
| as of December 31, 2025  |            |           |           |           |           |           |           |           |           |           |           |            |
|  | PY 1-26    | PY 27     | PY 28     | PY 29     | PY 30     | PY 31     | PY 32     | PY 33     | PY 34*    | PY 35*    | PY 36*    | Program    |
| Program Year   | Years      | 2016/17   | 2017/18   | 2018/19   | 2019/20   | 2020/21   | 2021/22   | 2022/23   | 2023/24   | 2024/25   | 2025/26   | Average    |
|  | 1990-2016  | 7/1/16-17 | 7/1/17-18 | 7/1/18-19 | 7/1/19-20 | 7/1/20-21 | 7/1/21-22 | 7/1/22-23 | 7/1/23-24 | 7/1/24-25 | 7/1/25-26 | Over 5 yrs |
| Number of Members  | N/A        | 43        | 44        | 43        | 43        | 43        | 43        | 43        | 40        | 40        | 41        | N/A        |
| Total Number of Claims   | 4,308      | 155       | 131       | 124       | 112       | 114       | 141       | 136       | 120       | 135       | 67        | 120        |
| Earned Premiums  | 67,465,809 | 3,819,319 | 3,799,075 | 4,060,508 | 3,849,105 | 4,109,108 | 4,187,792 | 4,343,504 | 4,081,842 | 3,823,534 | 1,694,051 | 3,626,145  |
| Paid Indemnity, Medical, & Rehab                                 | 41,787,550 | 1,947,657 | 1,917,179 | 1,594,422 | 1,111,816 | 1,578,568 | 1,312,611 | 1,213,735 | 441,854   | 1,033,282 | 148,829   | 830,062    |
| Paid Expenses  | 7,672,346  | 629,800   | 694,347   | 482,079   | 407,759   | 394,295   | 296,595   | 196,631   | 107,692   | 153,011   | 19,844    | 154,754    |
| Reserved Indemnity, Medical, & Rehab                             | 2,801,554  | 68,550    | 142,890   | 189,307   | 161,000   | 233,111   | 333,270   | 619,650   | 366,928   | 1,371,836 | 256,131   | 589,563    |
| Reserved Expenses  | 179,314    | 7,273     | 15,538    | 25,228    | 25,505    | 39,781    | 27,063    | 62,375    | 44,888    | 115,745   | 64,936    | 63,001     |
| Total Incurred   | 52,440,764 | 2,653,281 | 2,769,953 | 2,291,036 | 1,706,080 | 2,245,755 | 1,969,538 | 2,092,391 | 961,361   | 2,673,875 | 489,739   | 1,637,381  |
| Total Incurred Less ALAE   | 44,589,104 | 2,016,207 | 2,060,069 | 1,783,729 | 1,272,816 | 1,811,679 | 1,645,880 | 1,833,385 | 808,782   | 2,405,118 | 404,959   | 1,419,625  |
| CSRMA (Loss Ratio) Total Incurred Less ALAE / Earned Premium (%) | 66.09      | 52.79     | 54.23     | 43.93     | 33.07     | 44.09     | 39.30     | 42.21     | 19.81     | 62.90     | 23.90     | 39.15      |
|  |            |           |           |           |           |           |           |           |           |           |           | 57.62      |

\* - The pooled layer is reinsured by CWIC for these Program Years.



**Agenda Item No. G.1**  
**Workers' Compensation Committee Meeting**  
**Meeting Date: February 19, 2026**

### **Safety/Loss Control and Wellness Reimbursements**

**ISSUE:** In order to help expedite processing of reimbursement requests, the CSRMA Executive Board gave staff direction to review and appropriately process reimbursement requests and then present a summary of the reimbursement requests and action taken to the Workers' Compensation Committee at each meeting.

**RECOMMENDATION:** Review the attached reimbursement request summary and discuss.

**FISCAL IMPACT:** Both reimbursement programs have been included in the current fiscal years' risk control budget.

**BACKGROUND:** CSRMA has a history of wishing to reward those members who invest in controlling their risk. In the Workers' Compensation Pool, CSRMA rewards top performers with the Workers' Compensation Excellence Award.

The 2025/26 Risk Control Budget was approved with funding for these two risk control incentive programs similar to what other pools offer their membership.

Only those requests that have been submitted and approved since the last Workers' Compensation Committee meeting are included on the attachments.

**ATTACHMENTS:** Reimbursements Since Last Committee Meeting

| Wellness Reimbursement Program: Reimbursements Since Last Committee Meeting |              |              |                 |                  |                   |  |
|---|--------------|--------------|-----------------|------------------|-------------------|--|
| Member  | Request Date | Program Year | Approved Amount | Contact          | Category          | Description  |
| Delta Diablo  | 10/16/25     | 25/26 Q2     | \$1,400.00      | Nitish Sharma    | Equipment         | Shiatsu Back massager  |
| Ojai Valley SD  | 10/6/25      | 25/26 Q2     | \$858.07        | Alison Young     | Equipment Service | Ice machine use as cooling aid and support mobile hydration stations. helping to ensure compliance with indoor and outdoor heat exposure and regulations.  |
| North of River SD   | 1/5/26       | 25/26 Q3     | \$1,400.00      | Patrick Ostly    | Equipment         | Ergonomic office chairs  |
| Leucadia Wastewater District  | 9/3/25       | 25/26Q1      | \$1,400.00      | Paul Bushee (GM) | Equipment         | Flooring for new on site wellness/fitness center   |
| Union SD  | 7/11/25      | 25/26 Q1     | \$1,298.37      | Nasiha Rahman    | Program Mgmt      | Wellness sponsored little library. We purchased a little library to house In an employee breakroom. Employees are encouraged to leave or take a book. Holiday Cook-off: well loved event to foster community, sharing of recipes and social wellness. The reimbursement Is for prizes given to winners of the cook-off.. Wellnes bingo: did a twist on bingo to foster communication and social wellness. The bingo sheet consisted of finding employees who matched descriptions on the bingo card. Reimbursement is for associated prizes. Plant swap: encouraged employees to |

|  |  |  |  |  |   |
|--|--|--|--|--|---|
|  |  |  |  |  | bring plants that no longer brought joy and swap plants with others. Reimbursement for participant giveaways. Wellness Breakfast and FY25 Accomplishments Celebration: employees gather for a grab and go wellness breakfast and took time to note down an accomplishment they are proud of FY25 to display on a wall poster. \$331.83) |
|--|--|--|--|--|---|

| Safety and Risk Control Reimbursement Program: Reimbursements Since Last Committee Meeting |              |              |                 |                |            |   |
|--|--------------|--------------|-----------------|----------------|------------|---|
| Member   | Request Date | Program Year | Approved Amount | Contact        | Category   | Description   |
| Central Marin Sanitation Agency  | 11/05/25     | 25/26 Q2     | \$569.49        | Rebecca Brewer | Other      | Safety luncheon 10/01/25 to recognize employees commitment to safety. 12 employees recvd awards for various safety tasks. |
| Ojai Valley Sanitary District  | 10/06/25     | 25/26 Q2     | \$2,320.00      | Alison Young   | Consulting | Trainings, training schedule, brochures   |
| Delta Diablo   | 10/16/25     | 25/26 Q2     | \$2,097.38      | Nitish Sharma  | Equipment  | Field medic and stealth angel survival kit  |

|                                  |          |          |            |                  |           |  |
|----------------------------------|----------|----------|------------|------------------|-----------|--|
| North of River Sanitary District | 01/05/26 | 25/26 Q3 | \$2,500.00 | Patrick Ostly    | Equipment | Excavator                                |
| Leucadia Wastewater District     | 09/03/25 | 25/26Q1  | \$2,500.00 | Paul Bushee (GM) | Equipment | Handsfree wireless communication headset |

**Agenda Item: No.G.2**  
**Workers' Compensation Committee Meeting**  
**Meeting Date: February 19, 2026**

## **Annual Workers' Compensation Loss Analysis Report**

**ISSUE:** Each year the Risk Control Advisor provides the Workers' Compensation Committee with an analysis of the prior years' workers' compensation claims in order to determine trends and to better focus risk control efforts in areas where the members have the greatest need. The results of the 2024/25 analysis are then presented to the Executive Board for their review.

**RECOMMENDATION:** Review the results and discuss.

**FISCAL IMPACT:** None

**BACKGROUND:** By monitoring trends within CSRMA's workers' compensation claims, CSRMA has been able to respond with risk control programs that target areas of greatest loss. This type of analysis has resulted in the following CSRMA Risk Control Programs:

1. Workers' Compensation Claims Management and Return to Work Program
2. CSRMA's Return to Work Advocate
3. Well Workplace monthly newsletter
4. Ergonomics for the Wastewater Worker video training toolkit
5. In person and online ergonomics training
6. CSRMA Health Promotion Program

**ATTACHMENTS:** 2024-2025 CSRMA Annual Workers' Compensation Claims Analysis



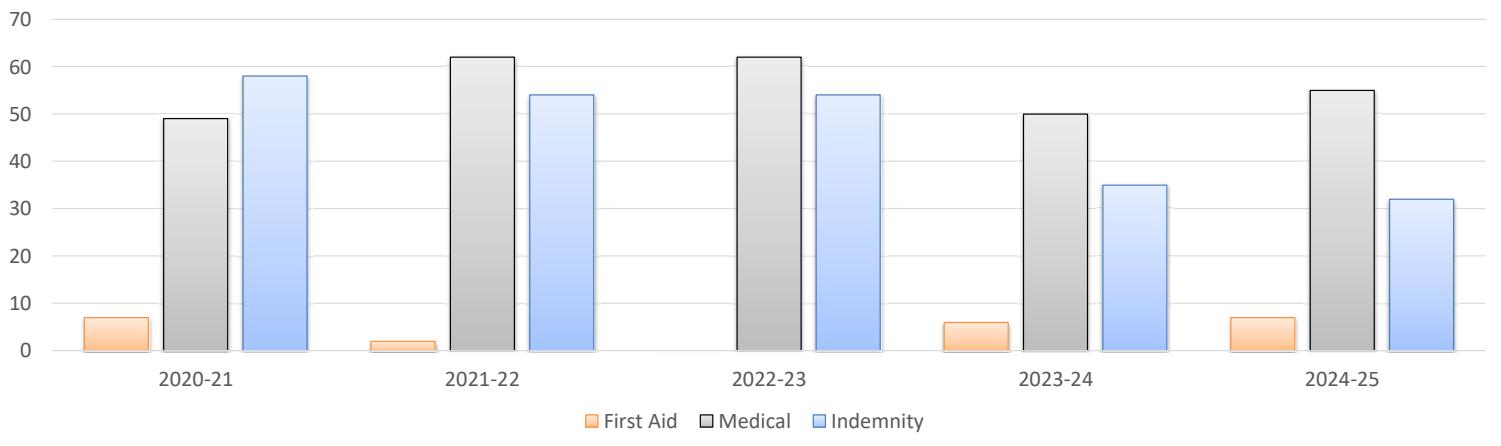
**2024-2025  
CSRMA Annual  
Workers' Compensation  
Claims Analysis**

6/30/2025

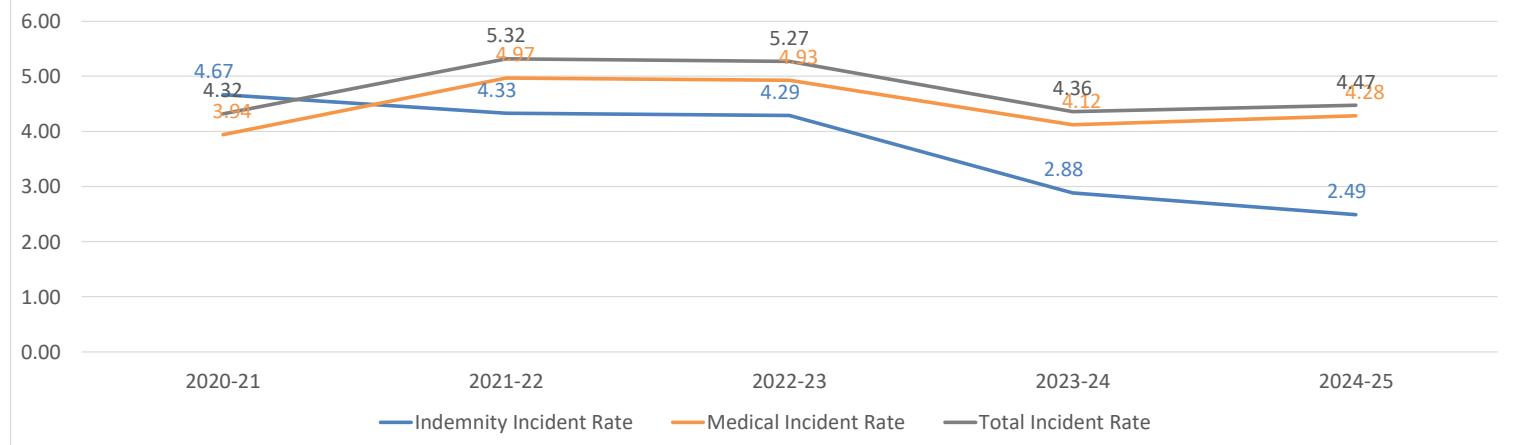
# How Are We Doing At Preventing Claims?

6/30/2025

Count by Claim Type by Year - FY 2020-21 to FY 2024-25



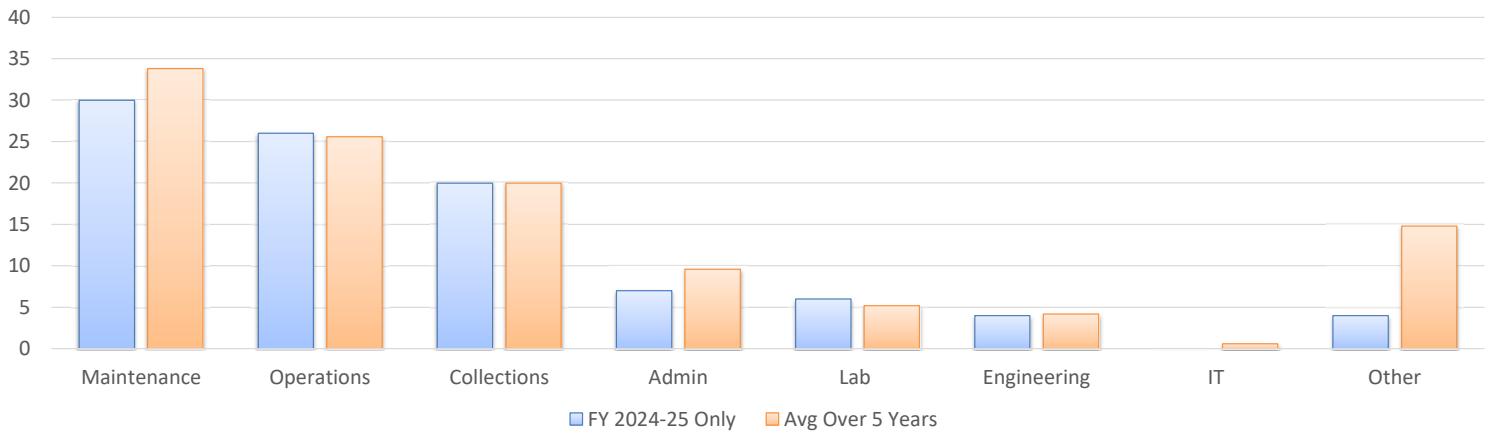
Incident Rates for Medical/Indemnity/Total Claims by Year - FY 2020-21 to FY 2024-25



# Who's Getting Hurt?

6/30/2025

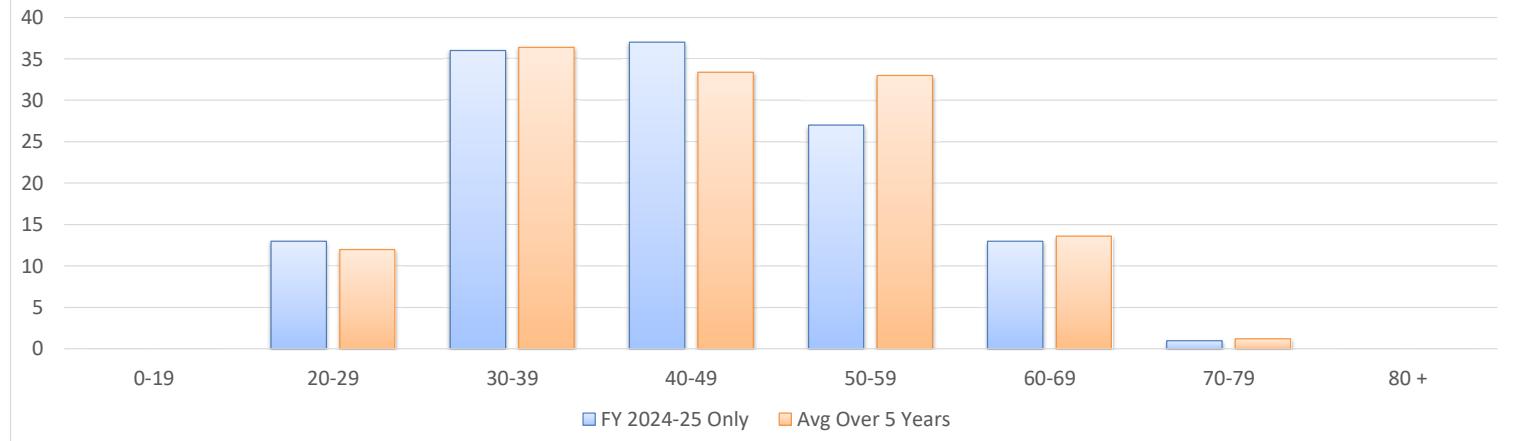
Top Claim Count by FY by Workgroup - FY 2024-25 vs. Average FY 2020-21 - 2024-25



# Who's Getting Hurt?

6/30/2025

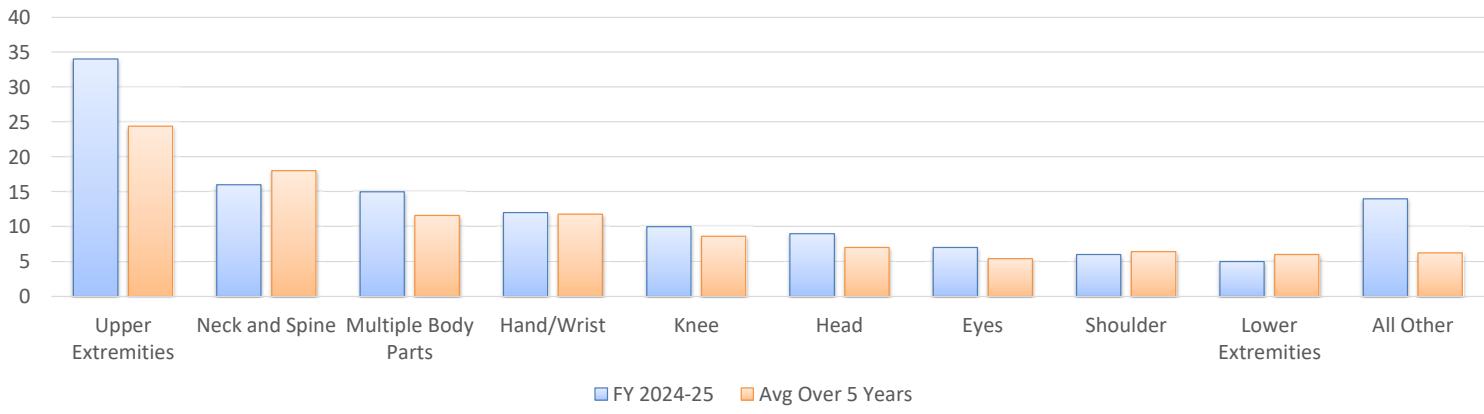
Top Claim Count by FY by Age - FY 2024-25 vs. Average FY 2020-21 - 2024-25



# What Are People Hurting?

6/30/2025

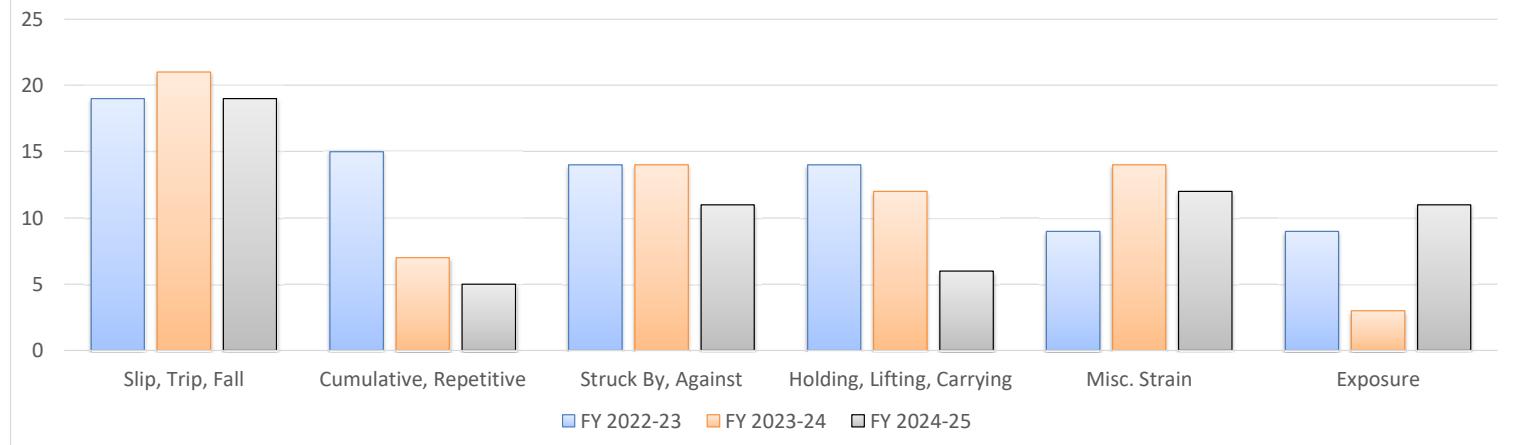
Workgroup by Hurt Body Part - Injury Avg - FY 2024-25 to 2020-21 vs 2024-25



# What Are People Hurting?

6/30/2025

Top 5 Claims by Cause by Year FY 2022-23 to FY 2024-25



## **CSRMA Risk Control Work Plan for 2026/27 – 27/28 - *DRAFT***

**ISSUE:** The Chairs of the Workers' Compensation and Liability Committees form the Risk Control Work Plan Sub-Committee and develop proposed risk control work plan items for the upcoming program year. The recommendations of the Risk Control Work Plan Sub-Committee are then presented to each Committee and their comments incorporated into the draft Risk Control Work Plan which is then presented to the Executive Board for discussion at the annual Long Range Planning meeting in March.

Additionally, at the direction of the Executive Board during the 2025 Long Range Planning Session, draft success metrics have been incorporated for each work plan initiative outside of the core Risk Control Advisor task list, to better define expected outcomes and support future evaluation of program effectiveness.

The draft Risk Control Work Plan for 2026/27 and 2027/28 is attached for the Committee's review.

**RECOMMENDATION:** The Risk Control Subcommittee recommends that the Workers' Compensation Committee recommend that the Executive Board approve the draft Risk Control work plan with any verbal changes that may be noted at the meeting.

**FISCAL IMPACT:** As indicated on the attached draft risk control work plan.

**BACKGROUND:** Each March, CSRMA Risk Control prepares an outline of the initiatives to be undertaken in the coming year to address ongoing and new exposures.

The Executive Board decided in 2016 to formulate the Risk Control Work Plan for two fiscal years each year to better plan for activities that span more than one fiscal year.

**ATTACHMENTS:** FY's 2026/27 and 2027/28 CSRMA Risk Control Work Plan

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Core Risk Control Services |  |         |                               |                               |                               |                       |  |                |                      |
|----------------------------|--|---------|-------------------------------|-------------------------------|-------------------------------|-----------------------|--|----------------|----------------------|
| Task #                     | Existing Task  | Purpose | Budget FY 25/26               | Projected FY 26/27            | Projected Cost FY27/28        | Services Provided By: | Notes  | Success Metric | Performance fy 25/26 |
| 1                          | <p>Update the CSRMA Risk Control Survey every 3 years to reflect regulatory changes, new and emerging exposures and best practices as directed by the Executive Board and the Workers' Compensation and Pooled Liability Committees.</p> <p>Administer the CSRMA Risk Control Survey every 3 years to the pooled program members.</p> <p>Following the deadline to complete the Risk Control Survey, conduct a follow up meeting to review deficiencies and recommendations in each member's Risk Control Survey Report.</p> |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |  | NA             |                      |
| 2                          | Write and distribute 12 monthly editions of the Did You Know e-newsletter.   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | Does CSRMA want to try a different medium than a newsletter - RC Subcommittee idea: podcasts | NA             |                      |
| 3                          | Visit 6 members per year for tour and meetings to review risk control services available.  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | New service added FY25/26  | NA             |                      |
| 4                          | Provide member hotline service via phone & email   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |  | NA             |                      |
| 5                          | Advertise and implement the CSRMA Risk Control and Wellness Reimbursement Programs   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |  | NA             |                      |
| 6                          | Provide annual workers' compensation and pooled liability loss analysis reports to each Committee and Executive Board  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |  | NA             |                      |
| 7                          | Recommend expenditures from the CSRMA Safety Other budget to the Program Administrators that will benefit CSRMA's risk control efforts   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |  | NA             |                      |
| 8                          | Administer the CSRMA Workers' Compensation Excellence award program  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |  | NA             |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Core Risk Control Services |   |         |                               |                               |                               |                       |   |                |                      |
|----------------------------|---|---------|-------------------------------|-------------------------------|-------------------------------|-----------------------|---|----------------|----------------------|
| Task #                     | Existing Task   | Purpose | Budget FY 25/26               | Projected FY 26/27            | Projected Cost FY27/28        | Services Provided By: | Notes   | Success Metric | Performance fy 25/26 |
| 9                          | Schedule, arrange & provide the following training seminars:<br>a. CASA /CSRMA Risk Management Seminars<br>1. Summer<br>2. Winter<br>b. A minimum of 18 webinars  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |
| 10                         | Training:<br>•Schedule and oversee 10 annual EPL online seminars on topics suggested by CSRMA legal counsel and/or LCW<br>• <b>Schedule and oversee the delivery of 6 interpersonal skills seminars (held in partnership with DKF Solutions Group)</b><br>•Oversee implementation and utilization of Vector Solutions (formerly Target) |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | Red = New service added FY25/26                             | NA             |                      |
| 11                         | Oversee the periodic update of the various CSRMA Risk Control manuals & training programs   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |
| 12                         | Prepare agenda items for the various CSRMA meetings, as needed  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |
| 13                         | Oversee the distribution of the CSRMA Well Workplace monthly newsletter   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | Does CSRMA want to try a different medium than a newsletter | NA             |                      |
| 14                         | Assist CSRMA with the development of risk control programs, initiatives & trainings to address ongoing and new loss exposures as needed or directed.  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |
| 15                         | Oversee the implementation of the CSRMA Workers' Compensation Claims Management Program   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |
| 16                         | Coordinate with the efforts of the CSRMA Return to Work Consultant  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |
| 17                         | Provide CSRMA with research/analysis of various risk control topics affecting CSRMA as needed/directed  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |   | NA             |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Core Risk Control Services |  |         |                               |                               |                               |                       |                           |                |                      |
|----------------------------|--|---------|-------------------------------|-------------------------------|-------------------------------|-----------------------|---------------------------|----------------|----------------------|
| Task #                     | Existing Task  | Purpose | Budget FY 25/26               | Projected FY 26/27            | Projected Cost FY27/28        | Services Provided By: | Notes                     | Success Metric | Performance fy 25/26 |
| 18                         | Maintain a library of sample risk control materials for distribution to CSRMA as requested   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |                           | NA             |                      |
| 19                         | Communicate with the CSRMA Program Administrator's to facilitate the delivery of risk control services   |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |                           | NA             |                      |
| 20                         | Prepare an annual 2-year Risk Control Work Plan for presentation to the CSRMA Executive Board at their annual Long Range Planning meeting  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      |                           | NA             |                      |
| 21                         | Administer member facing Kynd Cyber Risk Services such as monthly email to members with deficiencies, scheduling of webinars, providing relevant articles on cyber security for the monthly Did You Know e-newsletter  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | New service added FY25/26 | NA             |                      |
| 22                         | Oversee Risk Control Online and risk control related pages on CSRMA.org, including annual page info verification/updates, coordination of troubleshooting/info additions and deletions with the web masters  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | New service added FY25/27 | NA             |                      |
| 23                         | Develop analytics for measurable risk control activities and provide annual reports to the Executive Board and Committees  |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | New service added FY25/28 | NA             |                      |
| 24                         | Develop, manage and implement the CSRMA Risk Control Communications Calendar, including annual webinars, email notifications of key services such as the LCW EPL Hotline and EPL Deductible Incentive Program, Risk Control Services Roadmap and Where Is It and Who Can Help Guide updates/distribution |         | NA - part of Alliant contract | NA - part of Alliant contract | NA - part of Alliant contract | Alliant via PRCS      | New service added FY25/29 | NA             |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Continuing Risk Control Programs |   |   |                 |                    |                        |                       |  |                   |                      |
|----------------------------------|---|---|-----------------|--------------------|------------------------|-----------------------|--|-------------------|----------------------|
| Task #                           | Existing Task   | Purpose   | Budget FY 25/26 | Projected FY 26/27 | Projected Cost FY27/28 | Services Provided By: | Notes  | Success Metric(s) | Performance fy 25/26 |
| 25                               | Update and refresh 15 online courses each FY based on regulatory changes or age of course: Courses slated for update FY 26/27 include:<br>•Emergency Action Plan ('13)<br>•Fire Safety ('14)<br>•Compressed Air Safety ('15)<br>•Office Ergonomics ('15)<br>•Office Safety ('15)<br>•Portable Fire Extinguishers ('15)<br>•Near Misses ('15)<br>•Hearing Conservation ('16)<br>•Machine Safeguarding ('16)<br>•Back Safety ('17)<br>•Underground Utility Locating ('18)<br>•Vacuuming - Combo Unit ('18)<br>•USA "Call Before You Dig" ('18)<br>•Plugging Sewers ('18)<br>•Bypass Pumping ('18) | CSRMA has over 150 online courses and this update schedule will ensure information is up to date and kept fresh, especially for courses with annual refresher requirements/best practices                             | \$36,000        | \$38,000           | \$38,000               | DKF                   | Was task accomplished?   |                   |                      |
| 26                               | Risk and Safety Reimbursement Program   | Continuation of the incentive program created by the Workers' Compensation Committee in 2009. The purpose of the program is to incentivize members to pursue risk control efforts beyond basic regulatory compliance. | \$75,000        | \$75,000           | \$75,000               | NA                    | This budget item is fully utilized each year; the WCC has recommended this program be available to members of either pooled program. FY 23/24: EB increased reimbursement amount to \$2,500/member | 90%+ utilization  |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Continuing Risk Control Programs |   |   |                 |                    |                        |                       |   |  |                      |
|----------------------------------|---|---|-----------------|--------------------|------------------------|-----------------------|---|--|----------------------|
| Task #                           | Existing Task   | Purpose   | Budget FY 25/26 | Projected FY 26/27 | Projected Cost FY27/28 | Services Provided By: | Notes   | Success Metric(s)  | Performance fy 25/26 |
| 27                               | Employee Health Promotion Reimbursement Program   | Continuation of the incentive program created by the Workers' Compensation Committee in 2009. The purpose of the program is to incentivize members to pursue risk control efforts beyond basic regulatory compliance. | \$42,000        | \$42,000           | \$42,000               | NA                    | This budget item is fully utilized each year; the WCC has recommended this program be available to members of either pooled program.<br><br>FY 23/24: EB increased reimbursement amount to \$1,400/member | 90%+ utilization   |                      |
| 28                               | CSRMA's subscription to Vector Solutions and annual maintenance fee   | Provide online training platform to assist members with CalOSHA, safety and risk control training. It also provides a platform to host and make available the CSRMA online course library.                            | \$156,000       | \$168,090          | \$168,090              | Vector Solutions      | Vector indicates CSRMA is among the highest in terms of utilization by all they have for pool clients; Yellow highlight = pricing update pending  | Ideas:<br>•75%+ members using the platform annually<br>•Active users within 70%+ of the CSRMA member employee population |                      |
| 29                               | Update, manage, provide support and drive utilization for the CSRMA Vector Solutions, including instructional webinars and other video tutorials. | Drive member utilization of Vector Solutions  | \$24,000        | \$24,000           | \$24,000               | DKF                   | Vector indicates CSRMA is among the highest user subscribers they have for pool clients   | Ideas:<br>•75%+ members using the platform annually<br>•Active users within 70%+ of the CSRMA member employee population |                      |
| 30                               | Technical support for RCO and CSRMA-developed content.  | To fix bugs with CSRMA-developed web apps on Risk Control Online and correct issues with CSRMA-authored content on Vector Solutions   | \$5,000         | \$5,000            | \$5,000                | KBF Services          | Used as needed  | RCO and CSRMA-developed content web site down for fewer than 10 business days/yr   |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Continuing Risk Control Programs |  |   |                 |                    |                        |                       |   |  |                      |
|----------------------------------|--|---|-----------------|--------------------|------------------------|-----------------------|---|--|----------------------|
| Task #                           | Existing Task  | Purpose   | Budget FY 25/26 | Projected FY 26/27 | Projected Cost FY27/28 | Services Provided By: | Notes   | Success Metric(s)  | Performance fy 25/26 |
| 31                               | Annual support for Builders (usage and programming)  | This provides for Risk Control Online page editing, programming, server space and Accessibee (ADA compliance for the site)  | \$13,200        | \$14,000           | \$14,000               | DKF Solutions         | Some expenses in this line are annually recurring and others are billed as needed   | NA - this budget line item is to provide for debugging (as needed) and to provide server space for Risk Control Online |                      |
| 32                               | Develop 10 new web based training modules. Topics envisioned target areas of CSRMA's highest loss frequency, greatest risk or new regulatory requirements.<br>Proposed topics include: <ul style="list-style-type: none"><li>•Accident Investigation – Getting to the Root Cause for Accident Prevention</li><li>•Are You Prepared for Bypass Pumping?</li><li>•Best Practices for Preparing Collection System LROs, Supervisors, and Managers for Water Board Inspections</li><li>•Best Practices in Safety and Wastewater Facility Maintenance</li><li>•CalOSHA Inspections: Survival Planning and Tips</li><li>•Change Management: Leading Your Team Through Transformation</li><li>•Collaborative Accountability: Growing a Culture of Trust</li><li>•Contracts, Contracts, Contracts, How to Effectively Manage a Program</li><li>•TBD</li><li>•TBD</li></ul> | The goal of this annual work plan item is to help ensure members have access to training materials related to CSRMA's exposures and new regulatory requirements that may impact CSRMA member risks. | \$35,000        | \$38,000           | \$38,000               | DKF Solutions         | CSRMA-authored courses on Vector Solutions are consistently in top 10 of the most frequently taken courses on Vector by CSRMA members | At least 3 of the top 10 courses taken annually are CSRMA-authored (5/10 for 2025)                                     |                      |
| 33                               | Smart SOP (SOP development app for members (LOTO and freeform photo/video SOPs)  | This line item provides for app support and routine maintenance as well as programming of additional functionality in the app   | \$25,000        | \$20,000           | \$20,000               | DKF Solutions         |   | 50% or more of the membership have SOPs in Smart SOP (38/60 members have SOPs in their Smart SOP account)              |                      |

**Continuing Risk Control Programs**

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| Task #   | Existing Task                         | Purpose  | Budget FY 25/26 | Projected FY 26/27 | Projected Cost FY27/28 | Services Provided By: | Notes                                   | Success Metric(s)                | Performance fy 25/26 |
|--|---------------------------------------|--|-----------------|--------------------|------------------------|-----------------------|---|----------------------------------|----------------------|
| 34   | Kynd Cyber Risk Services subscription | To provide real time passive domain monitoring of CSRMA public facing networks and alert members to potential security risks | \$92,559        | \$99,964           | \$107,961              | Kynd                  | Contract calls for 8% increase annually | 50% uptake by Members to Kynd On |                      |
| <b>TOTALS:</b> \$503,759    \$524,054    \$532,051 |                                       |  |                 |                    |                        |                       |   |                                  |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

| New Risk Control Initiatives |   |  |                 |                    |                        |                       |  |                   |                      |
|------------------------------|---|--|-----------------|--------------------|------------------------|-----------------------|--|-------------------|----------------------|
| Task #                       | Existing Task   | Purpose  | Budget FY 25/26 | Projected FY 26/27 | Projected Cost FY27/28 | Services Provided By: | Notes  | Success Metric(s) | Performance fy 25/26 |
|                              | Per Patrick: Develop Traffic Control SOPs re: mobile operations and long term operations to distribute to members   | Provide more detailed guidance on high risk mobile traffic set ups than what is provided by the MUTCD      | \$ -            | \$ 20,000          | \$ -                   | DKF Solutions Group   | TBD  | TBD               |                      |
|                              | Provide training "Buddy to Boss" for employees being promoted to supervisory positions at 3 locations in CA   | Provide practical instruction for employees making the transition from coworker to supervisor              | \$ -            | \$ 33,000          | \$ 33,000              | DKF Solutions Group   | Alternative vendors are being researched to compare pricing            | TBD               |                      |
|                              | Per Patrick: LCW classes need to focus on application of concepts for supervisors/add classes intended for supervisors (educate LCW on CSRMA demographic) | This is intended to make the LCW classes designed for supervisors more applicable to the CSRMA audience    | \$ -            | \$ -               | \$ -                   | LCW                   | TBD  | TBD               |                      |
|                              | Per Tyson Interpersonal skills/harassment/bullying  | CSRMA can select LCW course on bullying in the annual 10 classes budgeted each year in the training budget | \$ -            | \$ -               | \$ -                   | LCW                   | 10 LCW classes per year are already part of the annual Training Budget | TBD               |                      |
|                              | Per Tyson: members w/recurring issues (EPL, WC, PL) - how to address - deductible P/P and require training/special RC audit, other mechanisms?            | To be discussed by the Committees  | \$ -            | \$ -               | \$ -                   | NA                    | TBD  | TBD               |                      |
| <b>TOTALS:</b>               |   |  | <b>\$ -</b>     | <b>\$ 53,000</b>   | <b>\$ 33,000</b>       |                       |  |                   |                      |

**2026/27-27/28 CSRMA Risk Control Work Plan - DRAFT**

|   |   |                   | Preliminary Projections for FY 26/27 in FY 25/26 | Projected FY 26/27 | Preliminary Projected FY 27/28 | % Change FY25/26 (adopted budget) to FY 26/27 (proposed budget) |  |  |
|---|---|-------------------|--|--------------------|--------------------------------|---|--|--|
|   | <b>Adopted in FY24/25 for FY 25/26</b>  |                   |  |                    |                                |   |  |  |
| Proposed Continuing Risk Control Programs | \$ 503,759                              | \$ 506,284        | \$ 524,054                                       | \$ 532,051         |                                |   |  |  |
| Proposed New Initiatives                  | \$ -                                    | \$ -              | \$ 53,000  | \$ 33,000          |                                |   |  |  |
| <b>Total</b>                              | <b>\$ 503,759</b>                       | <b>\$ 506,284</b> | <b>\$ 577,054</b>                                | <b>\$ 565,051</b>  | <b>14.5%</b>                   |   |  |  |
| Percent Change from Prior Year:           | 24.4% (addition of Kynd Cyber Services) | 0.50%             | 14.00%   | -2.10%             |                                |   |  |  |

**Agenda Item No. G.4**  
**Workers' Compensation Committee Meeting**  
**Meeting Date: February 19, 2026**

## **Workers' Compensation Excellence Award Criteria**

**ISSUE:** The CSRMA Workers' Compensation Excellence Award P&P #3-WC indicates the Workers' Compensation Committee shall review the prior years' losses and the number of members meeting the prior year's award criteria and recommend to the Executive Board that the award criteria remain the same or be updated to target a different type of injury. In the event of the latter, the Workers' Compensation Committee will provide the Executive Board with award criteria designed to reduce the frequency of the type of injury to be targeted.

The award criteria were changed for 2024 and unchanged in 2025. Typically, CSRMA runs the same application award criteria two consecutive years to allow more members the time needed to meet the application criteria.

**RECOMMENDATION:** The Program Administrators recommend the application criteria be changed as noted in the attached *draft* application for 2026.

**FISCAL IMPACT:** \$50,000 – this is included in the FY draft 26/27 budget.

**BACKGROUND:** None.

**ATTACHMENTS:**

1. CSRMA Workers' Compensation Excellence Award Policy and Procedure #3-WC.
2. *Draft* 2026 Workers' Compensation Excellence Award Application

**CSRMA**  
**POLICY AND PROCEDURE**  
**#3-WC**

**SUBJECT:** Workers' Compensation Program Award - Workers' Compensation Excellence Award Program

**EFFECTIVE:** August 6, 2004

**REVISED:**  
January 15, 2011  
January 22, 2015  
August 20, 2015  
January 24, 2018  
February 15, 2022

**Policy:**

Soft tissue injuries due to strain and overexertion are CSRMA's most frequent workers' compensation claims. CSRMA wishes to recognize those members of the Workers' Compensation Program who meet criteria developed by the Workers' Compensation Committee and adopted by the Executive Board each year that are designed to target these types of claims.

The first year this policy and procedure is implemented the type of injury to be targeted are low back injuries due to strain and overexertion. Members meeting the following criteria will be recognized:

Effective 2/15/22:

Have no low back lost time claims due to strain/overexertion for the program year being evaluated. (Note: No need to provide anything on your application for this item - CSRMA will verify using your agency's workers' compensation claims data for the time period of 7/1/21-6/30/22).

Provide evidence that the CSRMA Return to Work program, or equivalent, has been implemented in order help injured employees heal more quickly and reduce the indemnity portion of the workers' compensation claim. Specifically, provide evidence of the following:

- a. Copy of the form your agency uses when an employee reports an injury but declines medical treatment.
- b. Copy of the form your agency provides treating physicians to identify the physical activities the employee is able to perform to facilitate returning the injured employee to work when modified duty is necessary.
- c. Copy of the form your agency uses to document how an injured employee's job duties are being temporarily modified and the time period the modifications are valid.
- d. Copy of the form your agency uses to document the interactive process for permanently disabled employees.

For each work group at your agency, identify 15 *routine* and 10 *non-routine* tasks/equipment that, if operated/Performed incorrectly, are *likely* to cause any of the following:

- a. Injury to the employee performing the task/operating the equipment

- b. Injury to a coworker
- c. Damage to agency property
- d. Damage to private property

Once these have been identified, assign a risk score of 1-3 to each (3 being high probability) on each of the 4 criteria above and total the risk score for each task/equipment.

Example:

- Task: Setting up lane closures on public streets
  - a. Injury to the employee performing the task/operating the equipment: Risk Score = 3
  - b. Injury to a coworker: Risk Score = 3
  - c. Damage to agency property: Risk Score = 3
  - d. Damage to private property: Risk Score = 3
- Total Risk Score for this Task = 12

Please submit a copy of this written analysis with your application.

Perform the following for the 10 tasks/equipment that have the highest risk scores identified in item #3:

- a. Job Hazard Evaluation
- b. Develop an SOP with the completed JHA incorporated into the SOP (**Note:** The SOP must identify each step in the performance of the task or operation of the equipment so it can be used to train someone who has never performed the task or operated the equipment. Incomplete SOPs or SOPs without JHA's incorporated are not acceptable)

Please submit copies of a and b, above with your application.

Provide evidence that annual training on the ergonomic and biomechanical principles relevant to the work activities and risk factors present at your agency, by department, is being provided.

Provide evidence that an employee health promotion program with specific activities designed to target employee health risk factors has been implemented. The term "Program" does necessarily mean a written policy or procedure. Providing evidence of ongoing and regular efforts to reduce employee health risk factors will meet the definition of Program as used here. Examples:

- a. Onsite gym or gym memberships subsidies
- b. Brown bag lunch talks on wellness related topics
- c. Wellness incentive programs (i.e. 10,000 Steps A Day Program)
- d. Health Risk Factor Assessment programs or incentives

Working with staff from Operations, Collections and Maintenance (*as applicable*) identify at least 10 tasks per department staff feels are most physically strenuous in terms of lifting demands.

Using CSRMA's Physical Demand Assessment (*PDA*) software, evaluate each task identified in 7, above and provide a copy of the report for each task.

For any task in 8, above, that indicates a NIOSH score of 2.5 or greater provide evidence of how the task was redesigned, reengineered or otherwise modified (*i.e. team lift, mechanical assist, a material change, etc*) to reduce the NIOSH score to less than 2.5 (*please provide the report from the PDA software after the task was modified*).

Provide training to staff on human error and error prevention methods using the U.S. Dept of

Energy's Human Performance Improvement Handbook Vol. 1, CSRMA Human Error webinar or equivalent.

For Collections, Operations and Maintenance (*as applicable*), have each group evaluate 5 non-routine and 5 routine tasks with a high risk score from Step 3 for error precursors as described on Attachment 1.

For each of the 10 tasks identified above, identify at least 2 error reduction tools (*sample list provided below – you are not limited to these tools*) your agency can provide training and/or implement to reduce the likelihood of an error occurring when performing the task.

- Sample Error Reduction Tools:
  - Pre-job briefing
  - Trouble-shooting decision guide
  - Verification practices (i.e. Peer check, peer review, concurrent verification, independent verification, post job review)
  - Task review, Validate assumptions
  - Procedure use and adherence
  - Do not disturb signs
  - 2-way communication verification of understanding
  - Division of duties
  - Use of SAFER (Summarize steps, Anticipate errors, Foresee probable and worst case consequences at each step, Evaluate controls at each step to prevent, catch and recover from errors, Review relevant previous experience and lessons learned)

### **Procedures:**

To qualify for the award members must submit an application explaining how each of the award criteria has been met, along with proof of completion. The Workers' Compensation Committee will review each application and make recommendations to the Executive Board for those members meeting the award criteria.

Applications are due September 30 of each year for the prior Workers' Compensation program year ended June 30. Applications will be evaluated and qualifying agencies announced at the following January Board of Directors meeting.

Members meeting the award criteria will share equally in a cash prize of \$50,000, or an amount otherwise agreed to by the Executive Board upon a recommendation of the Workers Compensation Committee. The cash prize will be paid directly to the employees of each qualifying member in an amount not to exceed \$499 per employee.

Additionally, each qualifying member will receive the following:

1. Wall Plaque
2. Lobby Banner

Each year the Workers' Compensation Committee shall review the prior years' losses and the number of members meeting the prior year's award criteria and recommend to the Executive Board that the award criteria remain the same or be updated to target a different type of injury. In the

event of the latter, the Workers' Compensation Committee will provide the Executive Board with award criteria designed to reduce the frequency of the type of injury to be targeted.

## California Sanitation Risk Management Authority (CSRMA) 2026 Workers' Compensation Excellence Award Application (Due 9/30/26)

Name of Your Agency:

If we have questions regarding your application, who should we contact at your agency?

- Name:
- Phone: Email:

Please Note: This award program is only available to members of the CSRMA pooled Workers' Compensation Program. If you are unsure if your agency is a member, please contact David Patzer at [dpatzer@dkfsolutions.com](mailto:dpatzer@dkfsolutions.com) or Seth Cole at [Scole@alliant.com](mailto:Scole@alliant.com)

To qualify for the 2026 Workers' Compensation Excellence Award, please submit this application and support documentation electronically in pdf format following the directions below to David Patzer at [dpatzer@dkfsolutions.com](mailto:dpatzer@dkfsolutions.com) **and** Myron Leavell [mleavell@alliant.com](mailto:mleavell@alliant.com) by 9/30/26. Members submitting a qualifying application will be announced at the January 2027 Board of Directors meeting.

**NOTE:** Applications are not considered submitted unless you receive an email confirmation of receipt from David Patzer and/or Myron Leavell.

### **IMPORTANT NOTES:**

- If your agency was a recipient of the 2025 Workers' Compensation Excellence award, you will need to select different tasks for application items 3-4 and 7-9 than your agency used for your 2025 application.
- Application submittals must be submitted as a single pdf document with a table of contents and attachments/supporting documentation listed in the same order as the application.
- Submittals are not deemed accepted unless notified via email by David Patzer the application was received.

| <b>REQUIRED QUALIFYING CRITERIA (must meet each)</b>  | <b>SOURCES FOR HELP</b>   |
|---|---|
| <b>1:</b> Have no low back lost time claims due to strain/overexertion for the program year being evaluated. (Note: No need to provide anything on your application for this item - CSRMA will verify using your agency's workers' compensation claims data for the time period of 7/1/25-6/30/26). | <ul style="list-style-type: none"><li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li></ul>  |
| <b>2:</b> Provide evidence that the CSRMA Return to Work program, or equivalent, has been implemented in order help injured employees heal more quickly and reduce the indemnity  | <ul style="list-style-type: none"><li>• CSRMA Risk Control Advisor, David Patzer: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li><li>• CSRMA Workers' Compensation Claims and Return to Work Advisor, Heather Truro: <a href="mailto:htruro@gmail.com">htruro@gmail.com</a></li></ul> |

|  |  |
|--|--|
| <p>portion of the workers' compensation claim. Specifically, provide evidence of the following:</p> <ol style="list-style-type: none"> <li>a. Copy of the form your agency uses when an employee reports an injury but declines medical treatment.</li> <li>b. Copy of the form your agency provides treating physicians to identify the physical activities the employee is able to perform to facilitate returning the injured employee to work when modified duty is necessary.</li> <li>c. Copy of the form your agency uses to document how an injured employee's job duties are being temporarily modified and the time period the modifications are valid.</li> <li>d. Copy of the form your agency uses to document the interactive process for permanently disabled employees.</li> </ol>   | <ul style="list-style-type: none"> <li>• CSRMA's Workers' Compensation Claims Management and Return to Work Program available for download from <a href="#">Risk Control Online</a></li> </ul> |
| <p><b>3:</b> For each work group at your agency, identify 15 <u>routine</u> and 10 <u>non-routine</u> tasks/equipment that, if operated/Performed incorrectly, are <u>likely</u> to cause any of the following:</p> <ol style="list-style-type: none"> <li>a. Injury to the employee performing the task/operating the equipment</li> <li>b. Injury to a coworker</li> <li>c. Damage to agency property</li> <li>d. Damage to private property</li> </ol> <p>Once these have been identified, assign a risk score of 1-3 to each (3 being high probability) on each of the 4 criteria above and total the risk score for each task/equipment.</p> <p>Example:</p> <ul style="list-style-type: none"> <li>• Task: Setting up lane closures on public streets <ul style="list-style-type: none"> <li>a. Injury to the employee performing the task/operating the equipment: Risk Score = 3</li> <li>b. Injury to a coworker: Risk Score = 3</li> <li>c. Damage to agency property: Risk Score = 3</li> <li>d. Damage to private property: Risk Score = 3</li> </ul> </li> <li>• Total Risk Score for this Task = 12</li> </ul> <p>Please submit a copy of this written analysis with your application.</p> | <ul style="list-style-type: none"> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> </ul>   |

|   |   |
|---|---|
| <p><b>4:</b> Perform the following for the 10 tasks/equipment that have the highest risk scores identified in item #3:</p> <ol style="list-style-type: none"> <li>a. Job Hazard Evaluation (JHE)</li> <li>b. Develop an SOP with the completed JHE incorporated into the SOP (<b>Note:</b> The SOP must identify each step in the performance of the task or operation of the equipment so it can be used to train someone who has never performed the task or operated the equipment. Incomplete SOPs or SOPs without JHA's incorporated are not acceptable)</li> <li>c. Add the Risk Score from Task #3 for this task prominently at the top of each SOP to alert employees reviewing the SOP to the relative degree of risk when performing this task.</li> </ol> <p>Please submit copies of a and b, above with your application.</p> | <ul style="list-style-type: none"> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>• CSRMA Smart SOP mobile app (free to CSRMA members) – contact <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>• OSHA's "How to Perform a Job Hazard Evaluation": <a href="https://www.osha.gov/Publications/osha3071.pdf">https://www.osha.gov/Publications/osha3071.pdf</a></li> </ul> |
| <p><b>5:</b> Provide evidence that annual training on the ergonomic and biomechanical principles relevant to the work activities and risk factors present at your agency, by department, is being provided.</p>   | <ul style="list-style-type: none"> <li>• Vector Solutions has numerous training resources available on office and industrial ergonomics.</li> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> </ul>   |
| <p><b>6:</b> Provide evidence that an employee health promotion program with specific activities designed to target employee health risk factors has been implemented. The term "Program" does necessarily mean a written policy or procedure. Providing evidence of ongoing and regular efforts to reduce employee health risk factors will meet the definition of Program as used here. Examples:</p> <ol style="list-style-type: none"> <li>a. Onsite gym or gym memberships subsidies</li> <li>b. Brown bag lunch talks on wellness related topics</li> <li>c. Wellness incentive programs (i.e. 10,000 Steps A Day Program)</li> <li>d. Health Risk Factor Assessment programs or incentives</li> </ol>  | <ul style="list-style-type: none"> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>• <a href="#">Wellness Councils of America Free Wellness Resources</a></li> <li>• <a href="#">American Heart Association Workplace Wellness Resources</a></li> </ul>   |
| <p><b>7.</b> Working with staff from Operations, Collections and Maintenance (as applicable) identify at least 10 tasks per department staff feels are most physically strenuous in terms of lifting demands.</p>   | <ul style="list-style-type: none"> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>• Don Freeman: <a href="mailto:donfreeman@sentinelus.com">donfreeman@sentinelus.com</a></li> </ul>   |

|  |  |
|--|--|
| <p>8. Using the Center for Disease Control's (CDC) NIOSH Lifting Equation app, calculate the Lifting Index for each task identified in Criteria 7.</p>   | <ul style="list-style-type: none"> <li>CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>CDC's NIOSH Lifting Equation app download for Apple iOS and Android: <a href="https://www.cdc.gov/niosh/ergonomics/about/RNLE.html">https://www.cdc.gov/niosh/ergonomics/about/RNLE.html</a></li> </ul>   |
| <p>9. For any task in 8, above, that indicates a NIOSH Lifting Index of 2.5 or greater provide evidence of how the task was redesigned, reengineered or otherwise modified (i.e. team lift, mechanical assist, a material change, etc) to reduce the NIOSH score to less than 2.5 (please provide the report from the PDA software after the task was modified).</p> | <ul style="list-style-type: none"> <li>CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>Don Freeman: <a href="mailto:donfreeman@sentinelus.com">donfreeman@sentinelus.com</a></li> </ul>  |
| <p>10. For 5 tasks identified in Task #7 conduct a brief video-based task review to visually validate that the modified task, as performed in the field, reflects the intended ergonomic improvements and does not introduce new strain or overexertion risks.</p>   | <ul style="list-style-type: none"> <li>CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>AIHA Ergonomic Assessment Toolkit: Attachment 2</li> <li>HSE Ergonomics and Human Factors at Work: <a href="https://www.hse.gov.uk/pubns/indg90.pdf">https://www.hse.gov.uk/pubns/indg90.pdf</a></li> </ul>   |
| <p>The video review shall be used to evaluate:</p> <ul style="list-style-type: none"> <li>Body posture and spinal alignment (ie awkward postures eliminated or reduced)</li> <li>Reach distances and lift heights</li> <li>Use of mechanical assists or team lifts</li> <li>Other identified ergonomic hazards</li> </ul>  |  |
| <p>Provide documentation of each task review and any further task modifications identified to reduce ergonomic and other hazards.</p>  |  |
| <p>11. Provide training to staff on human error and error prevention methods using the U.S. Dept of Energy's Human Performance Improvement Handbook Vol. 1, CSRMA Human Error webinar or equivalent.</p>   | <ul style="list-style-type: none"> <li>CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>U.S. DOE Standards Human Performance Improvement Handbook Volume 1: Concepts and Principles: <a href="https://www.standards.doe.gov/standards-documents/1000/1028-BHdbk-2009-v1/@@images/file">https://www.standards.doe.gov/standards-documents/1000/1028-BHdbk-2009-v1/@@images/file</a></li> </ul> |
| <p>12. For Collections, Operations and Maintenance (as applicable), have each group evaluate 5 <u>non-routine</u> and 5 <u>routine</u> tasks with a high-risk score from Step 3 for error precursors as described on Attachment 1.</p>   | <ul style="list-style-type: none"> <li>Attachment 1 – Error Precursors (Short List)</li> <li>CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> </ul>   |
| <p>13. For each of the 10 tasks identified above, identify at least 2 error reduction tools (sample list provided below – you are not limited to these tools) your agency can provide training</p>   | <ul style="list-style-type: none"> <li>CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>U.S. DOE Standards Human Performance Improvement Handbook Volume 1: Concepts and Principles:</li> </ul>   |

|  |  |
|--|--|
| <p>and/or implement to reduce the likelihood of an error occurring when performing the task.</p> <ul style="list-style-type: none"> <li>• Sample Error Reduction Tools: <ul style="list-style-type: none"> <li>○ Pre-job briefing</li> <li>○ Trouble-shooting decision guide</li> <li>○ Verification practices (i.e. Peer check, peer review, concurrent verification, independent verification, post job review)</li> <li>○ Task review, Validate assumptions</li> <li>○ Procedure use and adherence</li> <li>○ Do not disturb signs</li> <li>○ 2-way communication verification of understanding</li> <li>○ Division of duties</li> <li>○ Use of SAFER (Summarize steps, Anticipate errors, Foresee probable and worst case consequences at each step, Evaluate controls at each step to prevent, catch and recover from errors, Review relevant previous experience and lessons learned)</li> </ul> </li> </ul> | <p><a href="https://www.standards.doe.gov/standards-documents/1000/1028-BHdbk-2009-v1/@@images/file">https://www.standards.doe.gov/standards-documents/1000/1028-BHdbk-2009-v1/@@images/file</a></p> <ul style="list-style-type: none"> <li>• U.S. DOE Standards Human Performance Improvement Handbook Volume 2: Human Performance Tools for Individuals, Work Teams and Management: <a href="https://www.standards.doe.gov/files/doe-hdbk-1028-2009-human-performance-improvement-handbook-volume-2-human-performance-tools-for-individuals-work-teams-and-management">https://www.standards.doe.gov/files/doe-hdbk-1028-2009-human-performance-improvement-handbook-volume-2-human-performance-tools-for-individuals-work-teams-and-management</a></li> </ul> |
| <p><b>14.</b> Develop and submit your written accident/near miss investigation program that includes a root cause analysis and senior management review/sign off.</p>  | <ul style="list-style-type: none"> <li>• Risk Control Online recorded webinar: "Incident Investigation – Getting to the Root Cause for Accident Prevention"</li> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> </ul>   |
| <p><b>15.</b> Submit documentation that the individual(s) responsible for managing your agency's workers' compensation and making return to work decisions have received online training from Don Freeman on the Sentinel Return to Work online portal.</p>  | <ul style="list-style-type: none"> <li>• CSRMA Risk Control Advisor: <a href="mailto:dpatzer@dkfsolutions.com">dpatzer@dkfsolutions.com</a></li> <li>• Don Freeman: <a href="mailto:donfreeman@sentinelus.com">donfreeman@sentinelus.com</a></li> </ul>  |
| <p><b>16.</b> Submit documentation that your agency's staff received training in 2026 on interpersonal skills/conflict resolution skills.</p>  | <ul style="list-style-type: none"> <li>• Courses on Vector: <ul style="list-style-type: none"> <li>• Tips for Successful Peer to Peer Communication</li> <li>• Workplace Communication Basics</li> <li>• Resolving Conflict with Coworkers</li> </ul> </li> </ul>  |

## Error Precursors (short list)



| Task Demands  | Individual Capabilities  |
|---|--|
| <input type="checkbox"/> Time pressure (in a hurry)                 | <input type="checkbox"/> Unfamiliarity w/task / First time       |
| <input type="checkbox"/> High Workload (memory requirements)        | <input type="checkbox"/> Lack of knowledge (mental mode)         |
| <input type="checkbox"/> Simultaneous, multiple tasks               | <input type="checkbox"/> New technique not used before           |
| <input type="checkbox"/> Repetitive actions, monotonous             | <input type="checkbox"/> Imprecise communication habits          |
| <input type="checkbox"/> Irrecoverable acts                         | <input type="checkbox"/> Lack of proficiency / Inexperience      |
| <input type="checkbox"/> Interpretation requirement                 | <input type="checkbox"/> Indistinct problem-solving skills       |
| <input type="checkbox"/> Unclear goals, roles, and responsibilities | <input type="checkbox"/> "Hazardous" attitude for critical task  |
| <input type="checkbox"/> Lack of or unclear standards               | <input type="checkbox"/> Illness / Fatigue                       |
| Work Environment  | Human Nature   |
| <input type="checkbox"/> Distractions / Interruptions               | <input type="checkbox"/> Stress (limits attention)               |
| <input type="checkbox"/> Changes / Departures from routine          | <input type="checkbox"/> Habit patterns                          |
| <input type="checkbox"/> Confusing displays or controls             | <input type="checkbox"/> Assumptions (inaccurate mental picture) |
| <input type="checkbox"/> Workarounds / OOS instruments              | <input type="checkbox"/> Complacency / Overconfidence            |
| <input type="checkbox"/> Hidden system response                     | <input type="checkbox"/> Mindset ("tuned" to see)                |
| <input type="checkbox"/> Unexpected equipment conditions            | <input type="checkbox"/> Inaccurate risk perception (Pollyanna)  |
| <input type="checkbox"/> Lack of alternative indication             | <input type="checkbox"/> Mental shortcuts (biases)               |
| <input type="checkbox"/> Personality conflicts                      | <input type="checkbox"/> Limited short-term memory               |

## **Workers' Compensation Excellence Award – Castro Valley SD**

**ISSUE:** An application submitted for the 2025 award was not included in the Committee's and Executive Board's review last fall due to an email server issue. The application was successfully submitted and met all program eligibility and evaluation criteria.

Following identification of the issue, the CSRMA Service Team implemented procedural changes to reduce the likelihood of recurrence. Award applications are now directed to be submitted to both Alliant staff and the Risk Control Advisor to ensure redundancy in receipt and tracking.

**RECOMMENDATION:** The Program Administrators recommend the Committee accept Castro Valley Sanitary District's application as having successfully met all 2025 award program requirements.

**FISCAL IMPACT:** None. Castro Valley Sanitary District will participate in the shared \$50,000 award, which is already included in the FY 2025/26 budget.

**BACKGROUND:** None



## Mirror

BY RITA DOVE

Mirror,  
take this  
from  
me:  
my blasted gaze,  
sunken  
astonishment. Resolve  
memory & rebuild; shame'll  
dissolve  
under powder pressed into  
my skin.

Mirror,  
this take  
from  
me:  
gaze blasted, my  
sunken  
resolve, astonishment.  
Shame'll rebuild & memory  
dissolve  
into pressed powder under  
skin, my

Oh, avalanche, my harbor:  
can I  
look  
over you;  
pit & pustule, crease & blotch  
without seeing  
you through you—  
if all I am  
(Am I all?)  
is *Woe is*  
me?

harbor, my avalanche. Oh  
I can  
look  
you over;  
blotch & crease, pustule & pit—  
seeing without  
you, through you.  
Am I all if  
all I am  
is *Woe is*  
me?

Notes:

This poem has special formatting. We recommend turning your device horizontal for landscape mode or picking up a print copy.

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Source: *Poetry* (June 2020)

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**NEWSLETTERS**

**PRESS**

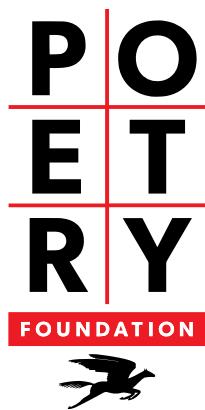
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**POETRY MOBILE APP**

61 West Superior Street,  
Chicago, IL 60654

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# You Chose a TPA That Delivers Where It Counts: Athens' DWC Audit Performance

 [athensadmin.com/news/athens-dwc-audit-results](http://athensadmin.com/news/athens-dwc-audit-results)

kkrzan

January 14, 2026



When you selected Athens Administrators as your Third-Party Administrator, you were choosing more than a service partner. You were choosing a team built around consistency, accountability, and long-term performance. One of the clearest ways to see that choice validated is through independent audits conducted by the **Division of Workers' Compensation (DWC)**.

These audits are not annual or routine check-the-box exercises. Each claims adjusting location is audited roughly every five years, and the focus is simple but critical: whether benefits are being handled accurately, timely, and in full compliance with statutory requirements. Strong results reflect day-to-day discipline, not short-term preparation.

## A Recent Example: Concord's 2025 Audit Result

One of the most recent results comes from our Concord office, which earned a **2025 Profile Audit Review score of 0.54348**. To put that in context, the DWC's compliance performance standard for that audit cycle was **1.57376 or less**. Scores below the standard indicate compliance. Lower scores reflect stronger performance.

Concord's result was not just in compliance. It was substantially better than the state expectation.

This matters to the organizations we serve as Concord handles a significant volume of complex claims. This score confirms that even at scale, the fundamentals remain strong.

## A Broader Look: Two Decades of Consistent Results

Concord's performance is not an outlier. It fits a long and consistent pattern across Athens' offices and audit cycles.

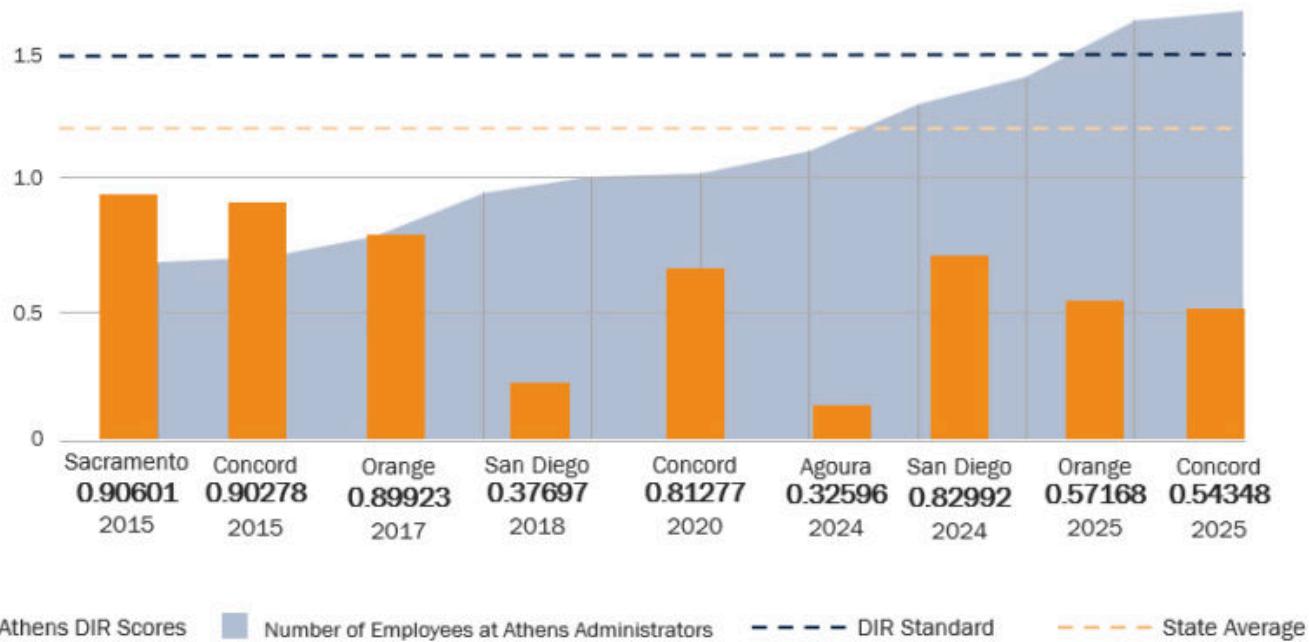
Athens has never been required to undergo a Full Compliance Audit, meaning we have never failed at the initial audit level, and over the past 20 years, across multiple locations and regulatory periods, our scores have consistently come in well below DWC standards:

- **2005 – 0.69631 (Concord)**
- **2010 – 1.39369 (Concord)**
- **2015 – 0.90278 (Sacramento)**
- **2015 – 0.90601 (Concord)**
- **2017 – 0.89923 (Orange)**
- **2018 – 0.37697 (San Diego)**
- **2020 – 0.81277 (Concord)**
- **2024 – 0.82992 (San Diego)**
- **2024 – 0.32596 (Agoura)**
- **2025 – 0.57168 (Orange)**
- **2025 – 0.54348 (Concord)**

Every one of these results is well below the current DWC performance standard.

Just as important, these outcomes have been sustained as Athens has grown. Increased staff counts, additional offices, and expanded client portfolios have not diluted performance. The processes scale because they are built correctly from the start.

## Division of Workers' Compensation Profile Audit Review Scores Over the Past Decade



### Why This Level of Consistency Matters to You

Because DWC audits occur periodically, not annually, they are a true test of how claims are handled every day. Strong results mean there is no scramble when an audit is announced. Files are already where they should be.

That consistency comes from:

- Experienced, stable claims teams
- Clear internal quality controls
- Ongoing training aligned with current regulations
- Standardized workflows that support compliance without sacrificing service
- Early identification and correction of potential issues before they escalate

This translates into fewer surprises, lower exposure, and confidence that compliance is not dependent on individual effort but embedded in the system.

### Independently Verified Performance

DWC audit results are publicly available, and Athens' performance is independently validated through the state's own review process. These are not internal benchmarks or marketing metrics. They are regulatory outcomes that can be reviewed and confirmed.

### Important Reminder

Strong audit results are not something most clients think about day to day, and that is often a good thing. When claims are handled correctly, compliance fades into the background.

Still, it is worth pausing to recognize what these results represent. Across decades, offices, and regulatory cycles, Athens has delivered steady, measurable performance in the areas that matter most.

You did not just choose a TPA. You chose a partner with a track record that continues to hold up when it is tested.

# OSHA Issues LOI on Recording Workplace Injuries Related to Lithium-Ion Batteries

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 [workcompwire.com/2026/02/osha-issues-loi-on-recording-workplace-injuries-related-to-lithium-ion-batteries](http://workcompwire.com/2026/02/osha-issues-loi-on-recording-workplace-injuries-related-to-lithium-ion-batteries)

February 10, 2026

Washington, DC – The U.S. Department of Labor's Occupational Safety and Health Administration has issued a letter of interpretation clarifying whether injuries resulting from the use of personal rechargeable lithium-ion batteries in the workplace should be recorded as work-related on the OSHA Forms 300, 301, and 300-A or equivalent forms.

If a work-related injury caused by a lithium-ion battery meets one or more of the general recording criteria in [Section 1904.7](#) of the Recording and Reporting Occupational Injuries and Illnesses standard, it must be recorded on the OSHA logs.

The letter addresses recordkeeping requirements and highlights the growing need for awareness of safety risks associated with lithium-ion batteries in workplace environments. These batteries can pose safety and health risks to workers during manufacturing, usage, emergency response, disposal, and recycling. Potential risks include fires, explosions, and exposure to harmful chemicals.

Safety measures employers can take include implementing hazard controls during battery design and production; ensuring proper ventilation; storing batteries in cool, dry locations; monitoring storage areas for flammable and toxic gases; using designated recycling facilities for disposal; and providing safety showers and eyewash stations when handling battery materials.

View the [Letter of Interpretation](#)

A Letter of Interpretation is OSHA's official response to questions about how its requirements apply to specific workplace situations or hazards. They cannot create additional employer obligations. Each letter constitutes OSHA's interpretation of the requirements discussed. These letters can help stakeholders understand how to comply with Federal OSHA standards, regulations, and section 5(a)(1) of the Occupational Safety and Health Act in specific workplace situations.

In June, [the Department of Labor launched its opinion letter program](#), which expands the department's longstanding commitment to providing meaningful compliance assistance that helps workers, employers, and other stakeholders understand how federal labor laws apply in specific workplace situations.

The public is encouraged to use the division's [new opinion letters page](#) to explore past guidance and submit new requests. The division will exercise discretion in determining whether and how it will respond to each request, which will focus primarily on attempting to address issues of broad-

based concern.

Source: OSHA

# New NCCI Analysis Reveals Shift in Large Claim Emergence Patterns

 [workcompwire.com/2026/02/new-ncci-analysis-reveals-shift-in-large-claim-emergence-patterns](http://workcompwire.com/2026/02/new-ncci-analysis-reveals-shift-in-large-claim-emergence-patterns)

February 2, 2026

Boca Raton, FL – NCCI recently announced new research examining how large workers compensation claims are emerging over time – specifically the changing balance between fast-emerging and slow-emerging large claims.

The analysis shows that while overall large claim frequency has declined, a growing share of large claims now reach \$1 million in incurred losses much earlier in the life of the claim.

Key findings included:

- Fast-emerging large claims are becoming a larger share of all large claims.
- At the \$1 million threshold, fast-emerging claims increased from 27% in 2003 to nearly 60% in 2023.
- The share of slow-emerging large claims have declined sharply over the last two decades.
- Overall large claim frequency has decreased, but claim emergence patterns are shifting.
- Earlier identification of severe claim characteristics—and improved claims management practices—may be contributing to fewer slow-emerging, “lurking” large claims.
- Drivers differ
  - Fast-emerging claims often stem from severe trauma events such as motor vehicle accidents, falls from elevation. These types of severe injuries sometimes necessitate higher utilization of in-home care—a factor that is known to increase costs.
  - Slow-emerging claims are more likely to be tied to strains and lifting injuries. Prescription drugs are often a more significant cost driver for slow-emerging large claims.
- Evidence suggests improvements in care coordination, reduced opioid utilization, and earlier case reserving may be influencing these trends.

This shift in large claim emergence patterns has implications for insurers, policymakers, employers, and the broader workers compensation system:

- Fewer slow-developing claims may reduce uncertainty in pricing, reserving, and long-term risk assessment.
- Earlier identification of severe injuries helps ensure injured workers receive timely, targeted treatment—supporting recovery and return-to-work.
- Trends point to the positive effects of improved claims practices, decreased opioid use, and faster intervention for severe injuries.

- Understanding how and when large claims emerge enables stakeholders to better anticipate costs, allocate resources, and manage complexity.

NCCI noted that the research evaluated large claims across thresholds of \$500,000, \$1 million, and \$2 million, and is based on NCCI states. The analysis builds on NCCI and multi-bureau work exploring trends in “mega claims” (up to \$10 million).

Read the full report: [NCCI: Fast and Slow Emerging Large Claims](#)

Source: NCCI

## CSRMA MEETING CALENDAR 2026

| JANUARY                                 |  | FEBRUARY                          |  | MARCH                                    |  | APRIL                             |  |
|---|--|-----------------------------------|--|--|--|-----------------------------------|--|
| <b>CSRMA EB - TUE - 13</b>              |  | CSRMA LIAB (TC) - TUE - 17        |  | <b>CSRMA LRP - SUN - TUE - 1, 2, 3</b>   |  | <b>CSRMA FIN - MON - 27 (SFO)</b> |  |
| <b>CSRMA BD - WED - 14</b>              |  | <b>CSRMA WC - THUR - 19 (SFO)</b> |  |  |  |                                   |  |
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| <i>CASA January 13 - 16</i>             |  | <i>PARMA February 24 - 27</i>     |  |  |  |                                   |  |
| <i>Indian Wells</i>                     |  | <i>Monterey</i>                   |  |  |  |                                   |  |
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| MAY                                     |  | JUNE                              |  | JULY                                     |  | AUGUST                            |  |
| CSRMA LIAB (TC) - MON - 4               |  | CSRMA EB (TC) - MON - 8           |  |  |  | <b>CSRMA EB - TUE - 4</b>         |  |
| CSRMA OC (TC) - TUES - 5                |  | CSRMA BOD (TC) - WED - 17         |  |  |  | <b>CSRMA BD - WED - 5</b>         |  |
| CSRMA WC (TC) - THUR - 14               |  | CSRMA OC (TC) - WED - 24          |  |  |  |                                   |  |
|   |  |                                   |  |  |  |                                   |  |
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|   |  |                                   |  |  |  | <i>CASA August 4 - 7</i>          |  |
|   |  |                                   |  |  |  | <i>Napa</i>                       |  |
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| SEPTEMBER                               |  | OCTOBER                           |  | NOVEMBER                                 |  | DECEMBER                          |  |
| <b>CSRMA LIAB - TUE - 8 (WC OFFICE)</b> |  | <b>CSRMA EB - MON - 5 (SFO)</b>   |  | CSRMA FIN (TC) - MON - 9                 |  | CSRMA EB (TC) - MON - 7           |  |
| CSRMA OC (TC) - FRI - 11                |  | CSRMA WC (TC) - WED - 14          |  | <b>CSRMA LIAB - MON - 16 (WC OFFICE)</b> |  | CSRMA OC (TC) - THUR - 10         |  |
|   |  | CSRMA OC (TC) - FRI - 30          |  |  |  |                                   |  |
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| <i>CAJPA September 15 - 18</i>          |  |                                   |  |  |  |                                   |  |
| <i>South Lake Tahoe</i>                 |  |                                   |  |  |  |                                   |  |
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**Meetings in RED are IN-PERSON**

# CSRMA

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Philip Leiber  
Ryan Green  
Jeffery Tucker

#### Treasurer-Auditor

Jason Dow

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Vince De Lange, Delta Diablo (Vice President)  
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Patrick Ostly, North of River SD  
Matt Anderson, Silicon Valley Clean Water (Alternate)

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Roland Williams

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Gibbons & Conley

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Mark Carlson, Union SD  
Jordan Damerel, Fairfield-Suisun SD  
Veronica Cazares, Selma-Kingsburg-Fowler County SD  
Robert Grantham, Santa Margarita Water District

#### Claims

Bill Kirker  
Beth Tavares  
Carl Warren & Co.

#### Program Management

##### Alliant Insurance Services, Inc.

#### JPA Administration & Insurance

Dennis Mulqueeney

Seth Cole

Myron Leavell

Marilyn Schley

P.J. Skarlanic

Steve Davidson

Thary Ou

Tevea Him

Phuntsok Gaphel

#### Loss Control Services

David Patzer, Patzer Risk Control Services  
CSRMA Risk Control Advisor

Heather Truro, HT Consulting  
Return to Work Consultant

#### Accounting

Tami Giovanni

#### Workers' Compensation Program Committee

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Jeffrey Kingston, Sausalito-Marin City SD  
Jennifer Sabine, Encina Wastewater Authority  
Jan Lee, Dublin San Ramon SD  
Matt Anderson, Silicon Valley Clean Water  
Erik Brown, Novato SD

#### Claims

Stella Sebastiani  
Athens

## Service Team

