



A Joint Powers Authority Established in 1980

May 2-3, 2024

**Special Board of Directors Meeting
Agenda**

PRESIDENT

Nathan Black

VICE-PRESIDENT

Nichole Williamson

SECRETARY

Van Maddox

OFFICER (PAST PRESIDENT)

Chester Robertson

OFFICER

Travis Goings

EXECUTIVE DIRECTOR

Andrew Fischer

GENERAL COUNSEL

Charles McKee

Location: RCRC, Conference Room, 1215 K Street, Suite 1650, Sacramento, CA 95814

Zoom:

<https://us06web.zoom.us/j/89562322499>

| Teleconference Locations | Director/Alternate | CA Gov. Code 54953 |
|--------------------------|--------------------|--|
| Trindel | | 51 Arbucklt Ct. Weaverville, CA 96093 |
| Colusa County | Ignacio Prado | 250 5th Street, Colusa, CA 95932 |
| Del Norte County | Neal Lopez | 981 H Street, Suite 210 Crescent City, CA 95531. |
| Trinity County | Trent Tuthill | 11 Court St, Room 230. PO Box 1613. Weaverville, CA 96093. |
| Mono County | Jay Sloane | 1290 Tavern Road, Mammoth Lakes, CA 93546 |

Day 1

Date: May 2, 2024
Time: 1:00 pm

Day 2

Date: May 3, 2024
Time: 9:00 am

ORDER OF BUSINESS

As to each agenda item, the Board may take active, give direction and/or receive informational reports.

1. Call to Order:

2. Roll Call:

3. Public Comment

- i. Matters under the jurisdiction of the Board, whether or not on the posted Final Agenda, may be addressed by the general public at this time. The total amount of time for public comment shall be no more than fifteen minutes. The President, with consensus of the committee, may establish reasonable regulations including, but not limited to, limiting the amount of time allocated for a particular issue and for each speaker. No action is to be taken or substantive discussion pursued on matters not on the posted Final Agenda.*

Reports

4. Strategic Planning: Presentation from Andrew Fischer on current progress of strategic plan from 2022, and overview of Trindel’s history. Discussion and direction from Board as appropriate.

5. **Investment Planning:** Presentation from Kevin Webb at RW Baird on investment strategy. Discussion and direction from Board as appropriate.
6. **Review of Member Satisfaction Survey:** Andrew Fischer to present member satisfaction survey results. Discussion and direction from Board as appropriate.

Closed Session

7. **Executive Director Evaluation of Performance:** Pursuant to CA Gov. Code section 54957.

8. Adjournment

- i. *Disability Access: The meeting room is wheelchair accessible and disabled parking is available at the meeting location. If you are a person with a disability and you need disability-related modification or accommodations to participate in this meeting, please contact the Executive Director at (phone) 530-623-2322, (fax) 530-623-5019 or (email) afischer@trindel.org. Requests for such modifications or accommodations must be made at least two full business days before the start of the meeting.*



CALL TO ORDER

1.



ROLL CALL

2.

CALL MEETING TO ORDER

| | | | |
|------------------|---|-------------------|---------------------------------|
| Alpine County | Nichole Williamson Klaus Leitenbauer | Plumas County | Travis Goings Debra Lucero |
| Colusa County | Kaline Moore Ignacio Prado | San Benito County | Ray Espinosa Henie Ring |
| Del Norte County | Neal Lopez Randy Hooper | Sierra County | Van Maddox Judi Behlke |
| Lassen County | Richard Egan Samantha McMullen | Sutter County | Nate Black Jason Claunch |
| Modoc County | Chester Robertson Tex Dowdy | Tehama County | Gabriel Hydrick Coral Ferrin |
| Mono County | Sandra Moberly Jay Sloane | Trinity County | Suzie Hawkins Trent Tuthill |

Total Member Entity's present _____
(7 members are required to hold a quorum)

Other people present:

ESTABLISHMENT OF A QUORUM

Article IV, Section 3. Of the Bylaws: Quorum-A majority of the Directors holding office shall constitute a quorum for the transaction of business at any meeting. All actions of the Board shall require the affirmative vote of a majority of the members at a meeting duly held at which a quorum is present.



PUBLIC COMMENT

3.

Allow public to address the Board of Directors:

Matters under the jurisdiction of the Board, whether or not on the posted Final Agenda, may be addressed by the general public at this time. The total amount of time for public comment shall be no more than fifteen minutes. The President, with consensus of the Board, may establish reasonable regulations including, but not limited to, limiting the amount of time allocated for a particular issue and for each speaker. No action is to be taken or substantive discussion pursued on matters not on the posted Final Agenda.



TRINDEL SPECIAL BOARD MEETING

May 2024

REPORTS

AGENDA ITEM 4.

SUBJECT: Presentation from Andrew Fischer on Trindel's history, and strategic planning.

ACTION FOR CONSIDERATION: Informational item.

BACKGROUND: At the February 12-13, 2024 Board of Directors the Board of Directors of provided direction to the Executive Director to go over the strategic plan.


FISCAL IMPACT: N/A

RECOMMENDATION: N/A




Trindel Insurance Fund Strategic Planning

1980-Present



It all starts with Risk

- When our people are injured (Workers' Compensation)
- When we hurt other people/property(Liability, Med-Mal, Pollution)
- When our property is damaged (Property)
- Prior to 1980 Trinity and Del Norte transferred their risk via traditional insurance.



The Beginning 1980-1985

- Insurance Crisis – No Insurance Available
- Trindel began as the "Trindel Workers' Compensation Fund" in 1980 consisting of Del Norte and Trinity pooling funds to cover workers' compensation.
- 1982, property and liability coverage were "added".
- Board consisted of one member and one alternate of each County.
- William Fullan, Auditor for Del Norte, was the Executive Director, Director for Del Norte, and Secretary/Treasurer.
- John "Jack" Larkin, Auditor for Trinity, was the President and Director for Trinity.



The Beginning 1980-1985

- TPA: Employer's Benefits Insurance (WC), Rooney and Anderson (L/P)
- Loss Control: Focus of the Board but contractor was unable to meet CAJPA standards on deliverables. Focus was to reduce workers' compensation losses.
- CAJPA Accreditation: 1984 Accredited with Excellence, Charter Member, with CSAC-EIA, Self-Insured Programs were properly funded but "liability program" was not structured in a way to where it could be considered a liability program. At this point the accreditation was only for workers' compensation and property.
- Board meetings were on an "as needed basis" only two votes were required to affirm or reject any action.
- Plumas County joined in 1984 and the name was changed to Trindel Insurance Fund.



The Beginning 1980-1985

- At this time the Trindel Workers' Compensation Fund was adequately funded with \$720,000 in the workers' compensation program, and \$300,000 in the liability/property fund.
- There was a \$100,000 SIR in the workers' compensation program, a \$25,000 SIR in the property program, and there was no SIR in the liability program as they did not purchase excess liability insurance.
- Investments were handled by the Del Norte County treasury, they obtained a certificate of consent to self-insure, there was a financial audit, filed the transactions report with the state controller, and completed their 700 forms.



Phase 2 1986 -1996

- 1986 saw the addition of Alpine, Colusa, Lassen, Modoc, and Sierra Counties to the existing membership of Del Norte, Trinity, and Plumas Counties.
- At this time Trindel also began purchasing excess liability coverage through CSAC-EIA.
- 1987 was a difficult year for Trindel: we did not apply for re-accreditation with Excellence from CAJPA; Plumas County left Trindel; and we had a negative net position of **\$208,000**.
- 1989 was the poorest performing year to date at that time with an increase in claim frequency and costs, and the premiums were not keeping up.



Phase 2 1986 -1996

- 1989 to help fight the poor performance Trindel began assisting counties in allocating premiums based on experience to the departments in the member counties to motivate better risk practices.
- Trinity County assumed control of the administration of the local hospital, and their claims. The result was financially disastrous for the County, and Trindel but Trindel remained solvent!
- Main financial exposure in this period was the workers' compensation program, and was the focus of risk control. In fact, Trindel itself was created to mitigate workers' compensation costs through risk financing, and risk control.



Phase 2 1986 -1996

- 1990 – Trindel applied to CAJPA for re-accreditation with excellence but it was denied due to improper accounting practices, and not utilizing actuarial studies in an appropriate manner.
- Trindel's programs were significantly underfunded in fact they were in a negative net position of \$4.2 million dollars.
- The CAJPA committee made recommendations for the Board to set policies to address the accounting policies, change the premium allocation methodology to properly fund the programs, and to increase the funding per the actuary recommendations. They also recommended that Trindel take a targeted risk control approach at the member level to address specific exposures to the workers' compensation and liability programs.



Phase 2 1986 -1996

- After the CAJPA denial of accreditation the Board of Directors approved the new funding methodology, and the \$4.2 million deficit was decreased to \$2.25 million in 1991. The deficit was further decreased to \$240,000 in 1992, and by 1993 Trindel was completely out of the deficit with a surplus of \$3.7 million dollars.
- During this period Trindel welcomed San Benito as a member in 1991.
- With the addition of the new members, the Board of Directors adopted our banking arrangement to self-fund their own losses, and purchased excess insurance through CSAC-EIA.

Phase 2 1986 -1996



- 1994 Trindel successfully applied for and was granted full accreditation with excellence from CAJPA because of the improvements made in our funding procedures.
- 1994 also marked the year that Trindel was finally able to secure a full time dedicated risk control consultant, Gene Herndon, while not an employee at the time he eventually was also the first Director of Risk Control, and employee of Trindel.
- The workers' compensation claims were handled by Risk Management Services (RMS), and Rooney and Anderson handled the property and liability claims.

Phase 2 1986 -1996



- 1995 saw the first strategic planning session for the Board of Directors. The objectives were: 1) Develop a plan to obtain competitive bidding on Trindel services/supplies i.e., ergonomic chairs. 2) Have all members obtain a personal computer (with a modem) and an on-line service for emails. 3) Develop a policy to inform member on how to control workers' compensation losses. 4) Develop a policy where counties are responsible to manage risk in their counties, and establish incentives to make it cost effective to do so. 5) Get better third party administration support with county workers' compensation plans. 6) Develop an evaluation process to review the third party administrators performance.

Phase 2 1986 -1996



- 1996 was another big year for Trindel as it saw the retirement of Executive Director William Fullan, and the hiring of Don Hemphill, former County of Sierra Auditor, as the Executive Director.
- This also saw the creation of the CSAC-EIA Primary Workers' Compensation program of which the Trindel members instrumental.

Phase 2 1986 -1996



Phase 3 1997-2009



- These are the years where Don Hemphill was the Executive Director, and a move away from self-insuring our workers' compensation losses. During this period we were members of the CSAC-EIA primary workers' compensation program which provided dollar one coverage and was very similar to traditional insurance.
- As a result, the assets of Trindel decreased significantly in this period as we gave them all to CSAC-EIA instead of funding the program ourselves.
- Assets in 1998 were \$9 million while in 1997 we had \$16.6 million. In 2009 we only had \$14.25 million, and Mono joined in 2000. Trindel was in essence a pass through organization/group purchasing arrangement with the only employees being the Executive Director, and Safety Officer. Everything else was handled under contract.

Phase 3 1997-2009



- Prior to 2005 the Strategic Plan was a living document that was revised 8 times.
- At the 2002 strategic planning session Trindel accomplished: 1) writing policies to include accounting procedures. 2) Review Trindel's by laws. 3) Establish a policy to allocate administrative costs. 4) Executive Director to filter information from EIA lobbyist. 5) Development of an internet, and email policy. 6) Conduct study to establish criteria for membership and to determine what types of entities are eligible.



Phase 3 1997-2009

- 2002 Strategic Planning Administrative Goals. Ensure that Trindel is a sound stable, and responsive organization: Write accounting and operational policies; Trindel Board members to be involved with EIA; attendance at Trindel board meetings; stay involved with CSAC and RCRC. Ensure that Trindel is a cost-effective and competitive organization: Evaluate effectiveness of loss prevention subsidy; look for new liability/property TPA; response to emerging trends; evaluate effectiveness of loss prevention program; analyze risk transfer/retain for best deal; review attorney panel; Ensure that Trindel is conduit for information exchange: Develop safety policies; create Trindel annual report; staff to provide informational presentations and orientations; keep the Trindel website current.



Phase 3 1997-2009

- 2002 Strategic Planning Administrative Goals. Ensure that Trindel is prepared for membership growth: Formalize Board policy on accepting new members.
- Program Goals, Trindel is committed to loss prevention programs: Software to track I/H reports; require members to adopt sexual harassment, workplace violence, ADA, IIPP, and driver policies; develop certificate program for leadership/supervisor training; loss prevention committee to direct loss prevention efforts and report to Board; analyze losses and provide recommendations; monitor legislation for things that impact programs; make safety a priority; put safety policies on website; incentivize wellness; loss prevention audit; and loss prevention subsidy.



Phase 3 1997-2009

- 2005 Strategic Planning, Modoc – High Priorities: 1) Succession planning. 2) Health Coverage. 3) Board Meeting Attendance. Medium Priorities: 1) Board member orientation. 2) HR/EPL Training. 3) LSTP training plans. 4) Determine member eligibility. Low Priorities: 1) Member risk/loss prevention succession funding. 2) Grant writing. 3) 1 hour education at Board meetings.
- 2007-2008 Strategic Planning: Was associated with succession planning revolving around the retirement of Don Hemphill, and the hiring of David Nelson as Assistant Executive Director in 2009.

Phase 4 2010-2022



- 2010 Strategic Planning, Modoc – High Priorities: Hire additional loss prevention employee; bring workers' compensation claims administration in-house; website improvements; reconsider new supervisor boot camp to address County turnover; do not develop health insurance pool; begin considering pooling layer for workers' comp; financial software conversion.
- 2012: Brought worker's compensation claims administration in-house by hiring Director Lisa Mitchell, Examiner Sarah Haynes, Examiner Andrew Fischer, and Anita Cooper. We also hired George Vondrak as a loss prevention specialist, and then hired Randy Robertson in 2013.
- During this time we also moved away from the dollar one risk transfer program at CSAC-EIA in the PWC program and began self insuring the banking layers with an individual member \$300k SIR.

Phase 4 2010-2022



- Strategic Planning 2014: Sutter joined Trindel, added an additional workers' compensation claims examiner position (Katie Twitchell), and two clerical. Complete claims software conversion, completed in 2015. Gave direction to add one safety officer position (Tony Miller), and one focused on HR/EPL (Rachael Hartman) by 2016, Gene retired and Randy became Director of Risk Control. Build a new Trindel owned office, completed in 2015. Begin workers' compensation pooling feasibility study with goal to implement pool by 2019. Trindel began to pool workers' compensation up to \$1 Million in 2019. Bring property and liability claims administration in-house, completed by 2016, and hired additional support, Penny Jones, in 2020.

Phase 4 2010-2022



Phase 4 2010-2022
Strategic Planning 2019



Phase 4 2010-2022



- 2019 Strategic Plan: How the Board visioned Trindel to look in 2024: Public safety claims down 50%; well perceived by Sheriff's and presence with law enforcement; new diverse board that continues to be introspective; improve and innovate services; transitioned senior staff; membership growth; HHS training; excellence in workers' compensation; value banking layer-core service; sound reliable accounting; board engagement because of perceived value; and strategy to cover uncovered losses; reduced loss time claims; performance metrics; engagement of county management in claims.

Phase 4 2010-2022



- 2019 Strategic Plan 5 year objectives: Incorporation of law enforcement: recruit Sheriff board member, training and education; ADA awareness and jails/medical; facilitate Risk and Sheriff interaction; specific meeting for public safety. Uncovered losses: Identify risk, and coverage denials; explore mitigation and prevention; additional funding/coverage options. Branding: Establish measurements; promotions; new website that tells our story, and talking points for board members. Relationships: New staff orientation with Trindel; injured workers'; all claims reviews in person; presentations to Boards.
- Due to increased costs of excess liability coverage, the Board set the liability SIR at \$250k for the banking layers.

Phase 4 2010-2022



- 2021 – Randy Robertson retired, and Rachael Hartman became the Director of Risk Control.
- 2022 – Saw the addition of our newest member, Tehama County, David Nelson announced his retirement, and the Board hired a Transitional Executive Director. With that, we also hired Sean Houghtby as a replacement for the prior Property and Liability Director. Jack Contos was hired as Financial Analyst, and Becca Cooper was hired as Risk Control Analyst.

2022 Strategic Planning



- Revised Mission Statement
The Mission of Trindel Insurance Fund is to provide members the most cost-effective, and comprehensive risk financing mechanisms. We assure fiscal stability, effective risk control, and claims management, programs to promote superior service to meet the employees, the County, and public's needs.
- Revised Vision Statement
Trindel Insurance Fund will be the preeminent member-driven risk management source for California Rural Counties.

2022 Strategic Planning



Organizational Goals: #1 Create member satisfaction survey to address responsiveness, expertise, productivity, services, and accessibility (6 votes: 2 year goal). Completed in 2024, and will be presented later in the meeting.

#2 Expansion of law enforcement services (5 votes: 3 year goal). Law Enforcement Employee Assistance Program including peer support with Ann Carrizales, and crisis incident support with Frontline First. Conducted training for District Attorney's and Sheriff's to address false arrest/excessive force liability (Heck v. Humphrey). Panel of experts to address correctional liability for jails titled "Evolving Standards for Mental Health Care in Jails" June 21, 2024.



2022 Strategic Planning

Organizational Goals: #2 Expansion of law enforcement services (5 votes: 3 year goal) continued. Conducted training at Shield Training Center with renowned expert, RK Miller, who created active shooter training standards for FBI, April 2024. Creation of Law Enforcement Task Force to address covered risks to programs inclusive of industry experts. Focus is not to provide POST certified training but to provide trainings from panel of experts to address exposures to our covered programs.

Other ideas not prioritized but completed: Evaluation of staff pay/benefits (Salary Schedule, Senior Positions, cafeteria plan contribution, and new health insurance plan). Branding, Trindel Risk Management for Rural Counties, and new website.




2022 Strategic Planning

Products and Services Goals: #1 Special Focus when members have vacancies in critical positions (6 votes: 1 year goal). In house orientation or at member county for new board members, CAO, CoCo, HR, Risk, Safety, and Finance. On going support on a daily basis to be a resource to handle liability, workers' compensation, HR, finance, and general risk management issues. Act as a resource to refer quality contractors to fill key vacancies, and handle case specific issues. Provide continuous trainings on key functions for County risk management i.e, Risk Transfer in Contracts with Bob Marshburn. This is ongoing and continuous.



2022 Strategic Planning


Products and Services Goals: #2 Captive Feasibility Study – Phase II. Completed Captive Feasibility Study in January 2023, and Board determined that our pools are not mature enough to transfer claim liabilities with funds to Captive. Purpose of Captive was to maximize return on capital. This is being accomplished with current investment strategy. \$2.2 million in investment income from 7/1/23-3/31/24. Utilization of Kevin Webb to transition funds in CAMP (\$35 million) into self-directed portfolio investing \$1.8 million a month over the next 18 months into securities with comparative yields (in excess of 5%) and extended duration to maximize investment income in anticipation of a reduction of federal interest rate.



2022 Strategic Planning

Communication, Outreach, and Influence Goals: #1 Employee Orientation at Member Counties (7 votes: 1 year goal). Still in progress, we are working on creating a video for new employee orientations at member counties to give introduction to Trindel to communicate values, and familiarity to Trindel with all employees.

#2 Create a communications plan (4 votes: 3 year goal). Still in progress/partially complete. Audience is risk managers, supervisors, new employees, and attorneys we work with. Goal is to educate and show value of Trindel, educate volunteers, students, and contractors to decrease liability. Attend RCRC, and have annual member day/Trindel day.




2022 Strategic Planning

Communication, Outreach, and Influence Goals: #2 Create a communications plan (4 votes: 3 year goal) continued.
 Communication plan steps: Identify purpose of communication to selected audience, plan and design message, consider resources, strategize how to connect, create action plan, evaluation metrics.

DSR Conference, LPS Conference, Newsletter, Training Flyers, Keynote Speakers.

Thoughts?



Phase 5 2023-Present

Accomplishments beyond strategic plan:

- Developed successful marketing strategy of Trindel's programs in the re-insurance market as a homogenous risk of rural counties with Guy Carpenter to provide opportunity for future expansion of membership, risk financing, and coverages.
- Accurate data and risk management/claims software that enables us to target risk control efforts on specific exposures, and have accurate pricing with underwriters.
- Mature claims and risk financing organization with established procedures that has enabled us to achieve highest scores to date on performance metrics.

Phase 5 2023-Present



Accomplishments beyond strategic plan:

- Record attendance at webinar, and in-person trainings/conferences.
- Perfected leadership training curriculum, employee recognition, and employment practices liability/HR training emphasis.
- All time in high in engagement from DSR, LPS/HR, and Roads.
- Smith Systems driver training being rolled out by Tony to address one of our most frequent exposures, automobile accidents.
- Program to issue certificates of insurance.
- GFOA Certification for Excellence in Financial Reporting.

Phase 5 2023-Present



Accomplishments beyond strategic plan:

- 23-24: \$2.2 million investment income 7/1/23-3/31/24, and assets of \$107 million. As a comparison from 7/1/2013-6/30/2014 we had \$100k investment income and \$25 million in assets.
 - 24-25: \$1.8 million premium savings by moving workers' compensation and general liability SIR to \$2 Million from \$1 Million. This will increase our assets, and investment income.
- Huge milestone in Trindel history.


Phase 5 2023-Present



Emerging Risks:

- Increased payroll=increased funding requirements for self-insurance.
- Adverse development for excess liability coverage.
- Adverse development for property coverage.
- Less talent coming into risk management/claims industry.
- Rural areas are seeing population decline.
- Governance at member counties.
- Increased claim frequency and severity in every program.


Phase 5 2023-Present



Risks Unique to Rural Counties:

- Correctional liability
- District Attorneys (wrongful conviction)/False Arrest
- Employment Practices Liability
- Wildfire
- Auto/Transit
- 4850
- CPS
- Roads/Maintained Mileage


Phase 5 2023-Present



Future opportunities:

- Continue to invest in ourselves and rely less on excess insurance.
- New/additional office with Training Center on I-5 corridor.
- Targeted risk control efforts to address specific county risks to covered programs.
- New membership opportunities with full participation from banking layer up. Only rural counties, target should be counties with employees in the 500-1500 range for premium distribution. Would need approx. 1 WC adjuster per 2,000 employees insured, 1 WC Tech per 3,000 employees, 1 RC Analyst per 2,000 employees insured, and one P/L Adjuster per 3,000 employees. We currently insure 6,275 employees.
- Target membership to reach potential of current structure would be addition of Mendocino, Lake, Nevada, Yuba, Tuolumne, Calaveras, Mariposa, Glenn, Amador, and Inyo. This would require 4 additional WC Adjusters, 3 WC Tech's, 4 RC Analysts, a RC Tech/Coordinator and 3 P/L Adjusters. This would bring the total number of employees to 29, and total number of members to 22.

Phase 5 2023-Present



Future opportunities:

- Adding all of those counties would contribute an additional \$2.5 million to the GL pool, \$3.5 million to the WC pool, \$12.3 million to the GL banking layers, and \$17.6 million to WC banking layer in today's dollars.
- We do not have their loss data and would have to reserve our final opinion based on an actuarial analysis of claim experience.
- There is a market need for exactly what Trindel does for rural counties as the only risk sharing pool in California dedicated to Counties only, and we are well positioned for a successful future.



TRINDEL SPECIAL BOARD MEETING

May 2024

REPORTS

AGENDA ITEM 5.

SUBJECT: Presentation from Kevin Webb on current investment strategy.

ACTION FOR CONSIDERATION: Informational item.

BACKGROUND: During the course of this year we began an education process regarding investments in fixed income securities in an attempt to diversify our portfolio managers, and portfolio. To date, we are please to report that we have created a self-directed portfolio where we have entire control over our investments, and we are investing \$1.8 million dollars a month over the next month from our current California Asset Management Program holdings. The purpose of this would be to extend the duration from the sub 60 day maturities held in CAMP into securities with a similar yield and a longer duration which will produce similar income over an extended period.

Kevin will go over the investment philosophy we are undertaking, our current investments, and our plan over the next 18 months.

FISCAL IMPACT: N/A

RECOMMENDATION: N/A

Suitability Benchmark Executive Summary: Trindel-20240416 (04/16/24 Data)

CASH: 89.69% | Tsy:0.00% | AgyBit:0.00% | AgyStep:0.00% | AgyClbl:2.80% | Corp:1.10%

Par Amount (\$000): \$34,667.92 | Mkt Vlu (\$000): \$34,422.81 | Gain/Loss (\$000) Using Amort Cost: (\$53.43)

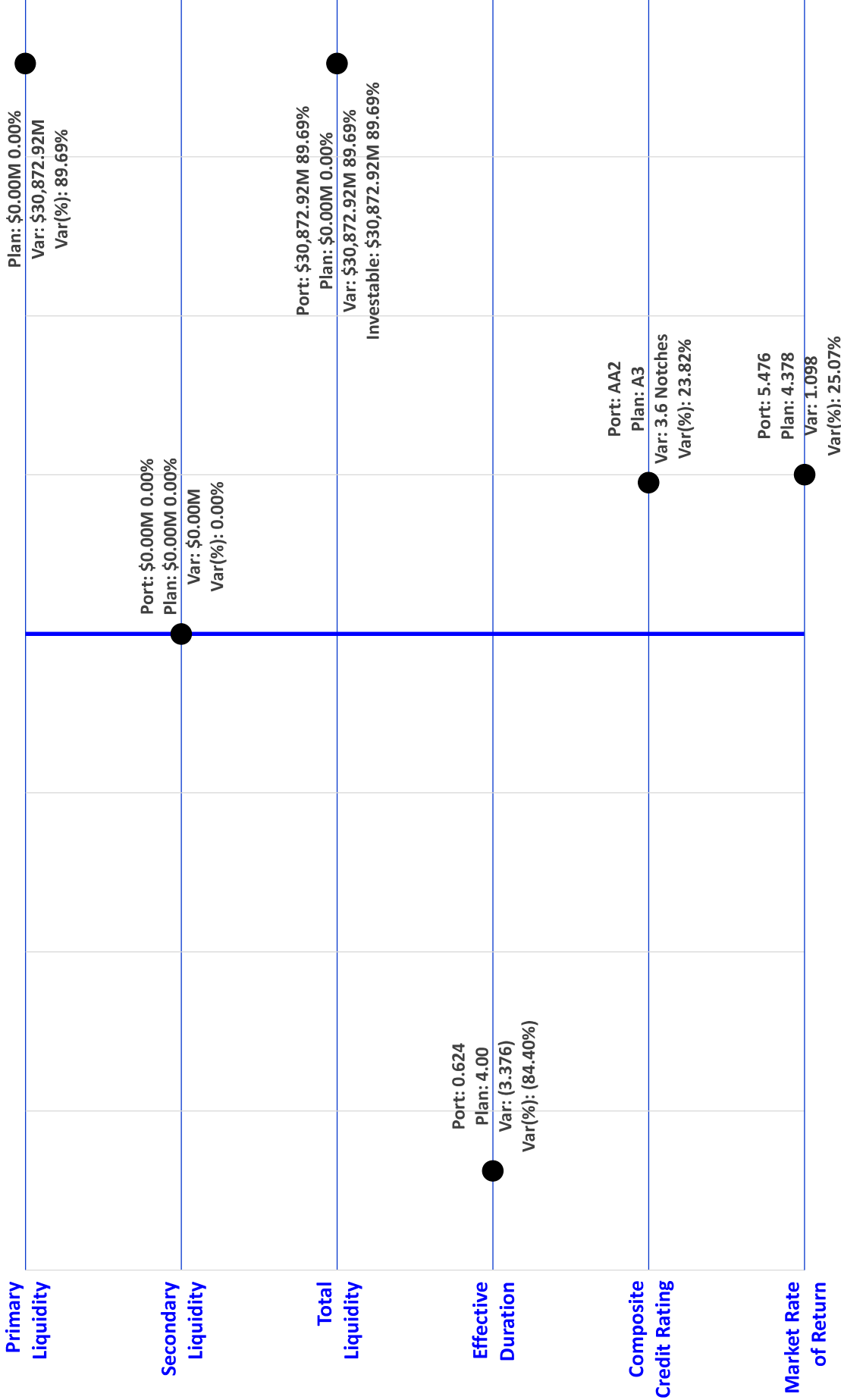
Years To Maturity: 1.22 | Modified Duration: 0.81 | Effective Duration: 0.62 | Effective Convexity: 0.00

Port: \$30,872.92M 89.69%

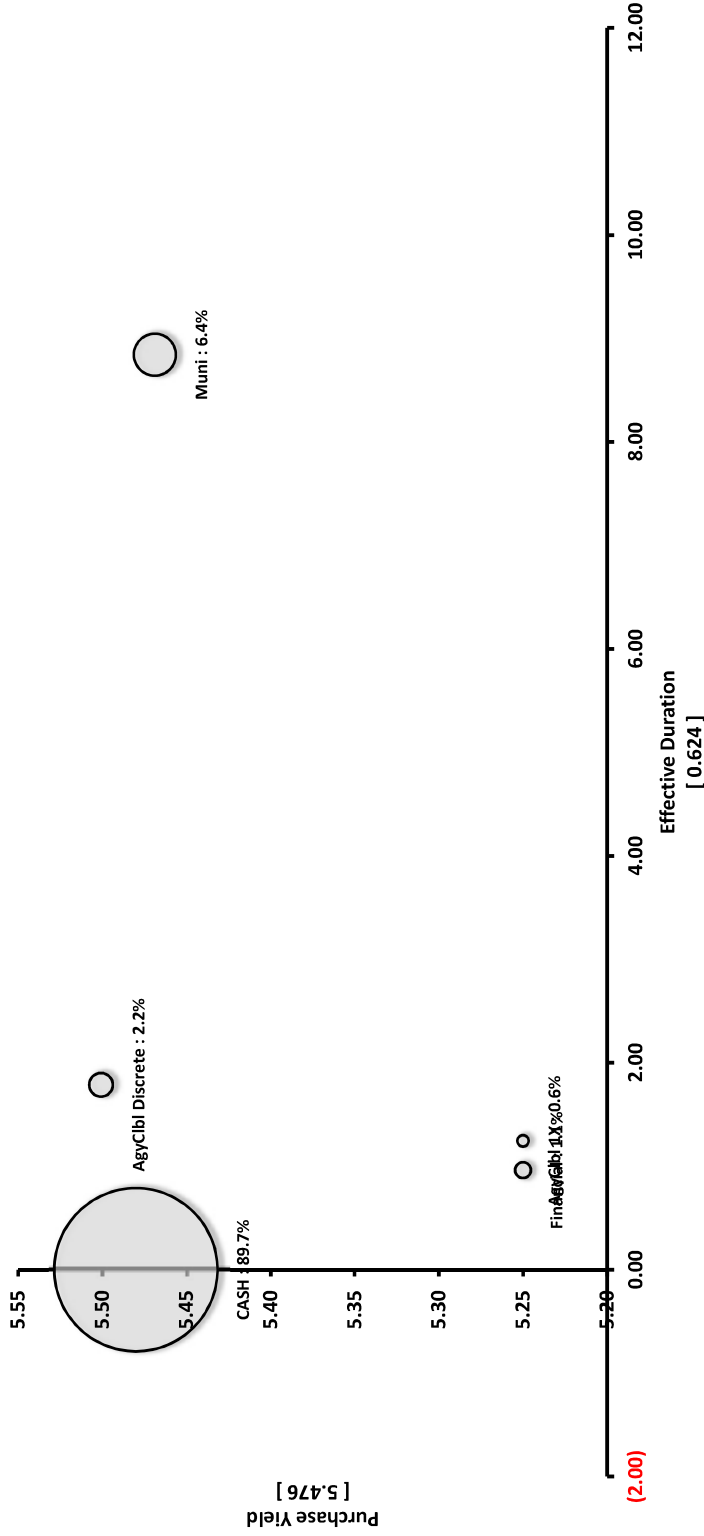
Plan: \$0.00M 0.00%

Var: \$30,872.92M

Var(%): 89.69%



Trindel-20240416 (Using 04/16/24 Portfolio Data)
 Effective Duration versus Purchase Yield Where Bubble Size is MktWgtd Purchase Yield [5.476]
 Par Amount (\$000): 34,667.92 | Effective Duration: 0.62 | OAS: 42.71



Portfolio: **Trindel-20240416**

Bubble Description: **Sector & MktWgt**

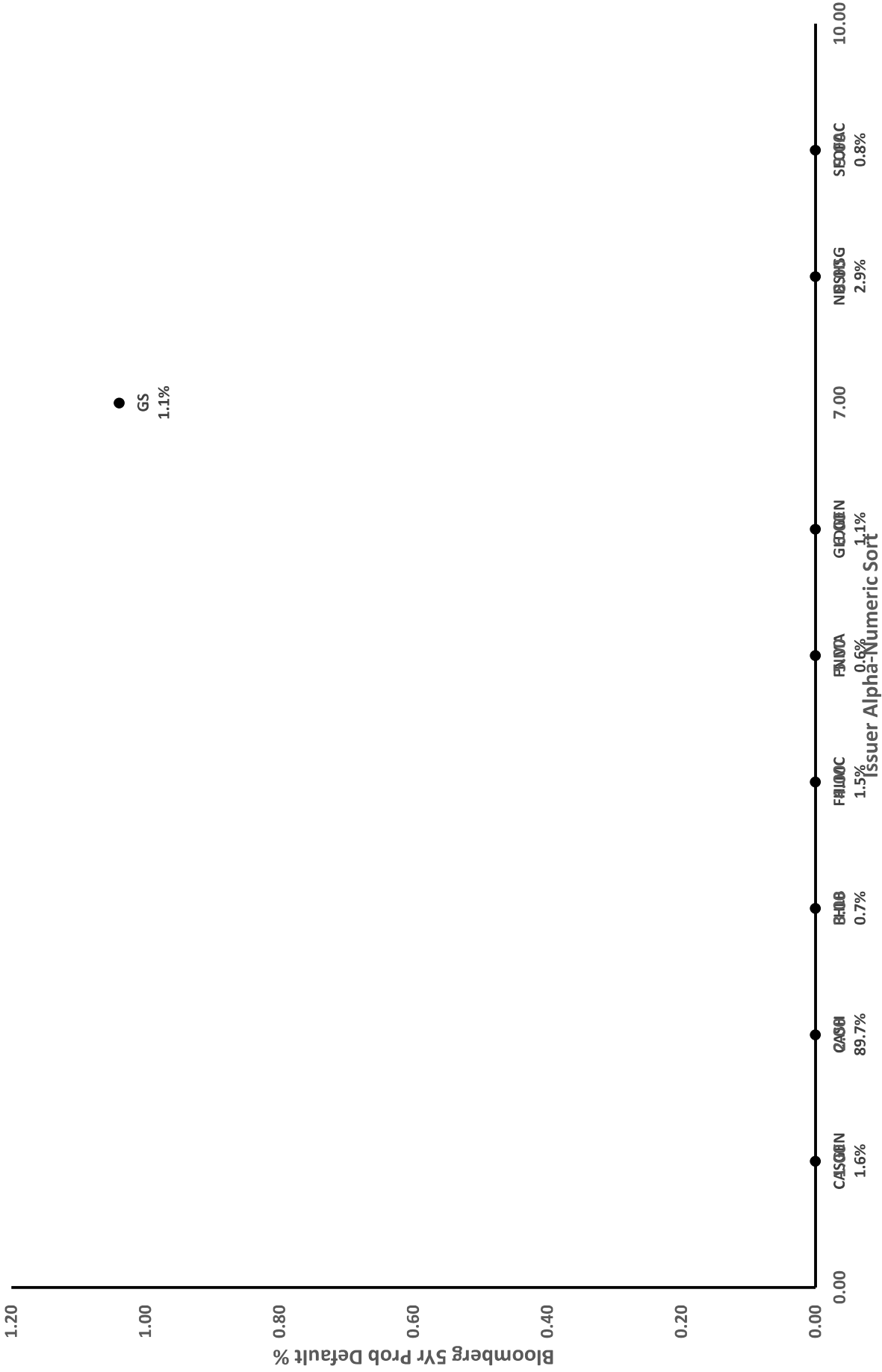
| Sector | Effective Duration [0.624] | Purchase Yield [5.476] | MktWgtd Purchase Yield [5.476] | % of Total Market Value 100.00% | Par Amount (\$000) [34,667.92] | Gain/Loss Using Amort Cost [(53.428)] | Yield To Convention [5.497] |
|-------------------------|---------------------------------|-----------------------------|--|---------------------------------------|--|---|-------------------------------------|
| CASH | 0.000 | 5.480 | 4.915 | 89.687% | 30,872.92 | 0.00 | 5.48 |
| US Treasury | | | | 0.00% | | | |
| SNAT | | | | 0.00% | | | |
| Agy Bullet | | | | 0.00% | | | |
| AgyClbl 1X | 1.246 | 5.250 | 0.033 | 0.626% | 215.00 | (0.78) | 5.39 |
| AgyClbl Discrete | 1.787 | 5.501 | 0.120 | 2.173% | 750.00 | (3.335) | 5.60 |
| Utility - Elec | | | | 0.00% | | | |
| Industrial | | | | 0.00% | | | |
| Financial | 0.962 | 5.250 | 0.058 | 1.104% | 380.00 | (1.193) | 5.42 |
| Bank | | | | 0.00% | | | |
| Asset Backed Securities | | | | 0.00% | | | |
| Mortgage Securities | | | | 0.00% | | | |
| Muni | 8.843 | 5.469 | 0.351 | 6.41% | 2,450.00 | (48.12) | 5.72 |
| Yankee | | | | 0.00% | | | |

The analysis is provided for informational purposes and the accuracy is not guaranteed. Market prices are indications only and subject to change. Market values include accrued interest.

Issuer Matrix for Trindel-20240416 (Using 04/16/24 Data)

Showing All Issuers

Data Labels Showing Ticker & Portfolio %



The analysis is provided for informational purposes and the accuracy is not guaranteed. Market prices are indications only and subject to change. Market values include accrued interest.

Issuer Matrix for Trindel-20240416 (Using 04/16/24 Data)

Trindel-20240416

Portfolio/Subset:

All

Show Cash:

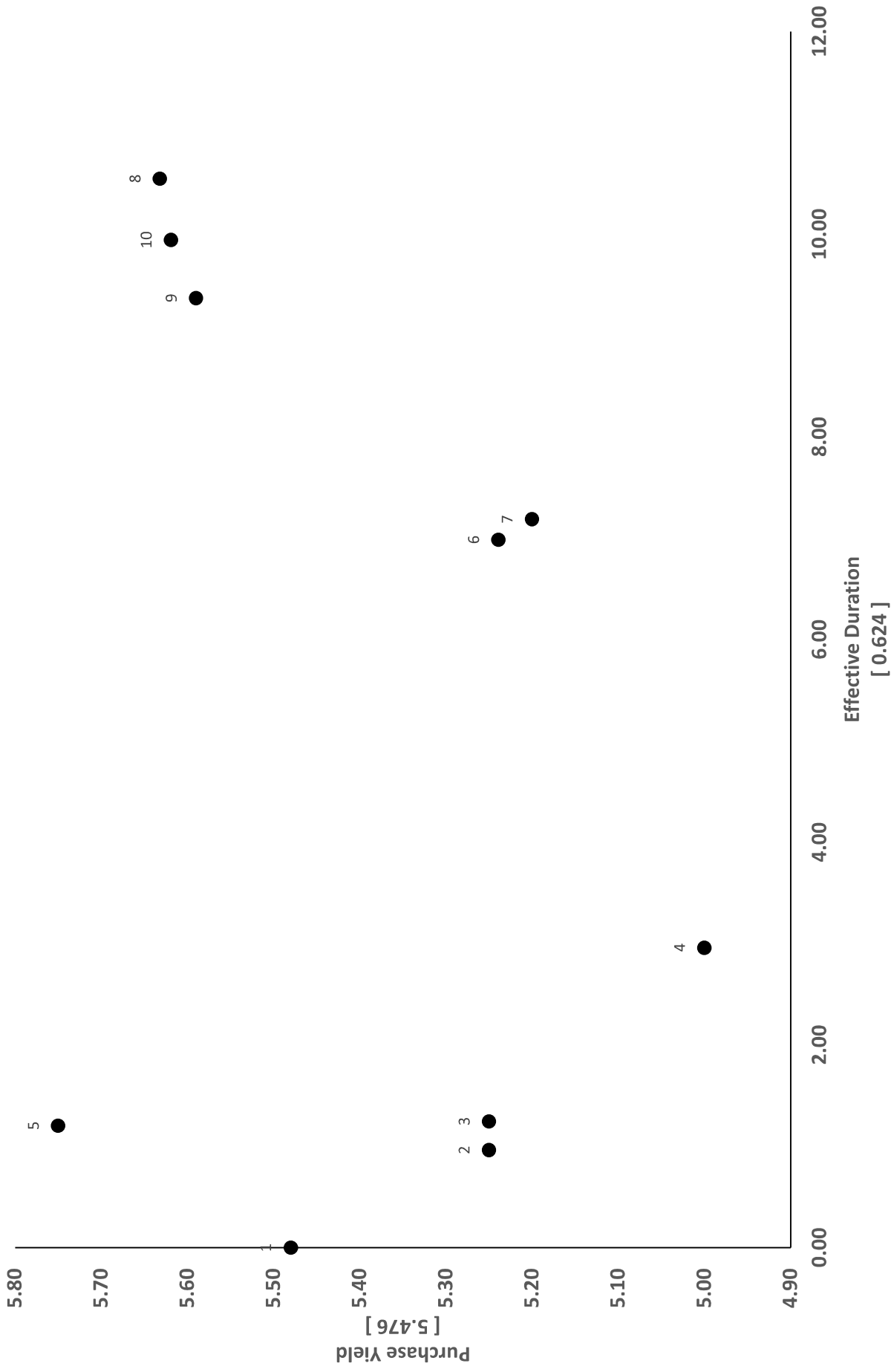
Yes

| Ticker | Par Amount (\$000) | % Portfolio | Effective Duration | Bloomberg 5Yr Prob Default % | Analyst % Buy Hold | Purchase Yield |
|--------|--------------------|-------------|--------------------|------------------------------|--------------------|----------------|
| CASGEN | 700.00 | 1.62 | 6.99 | 0.00 | 0.00 | 5.24 |
| CASH | 30,872.92 | 89.69 | 0.00 | 0.00 | 0.00 | 5.48 |
| FHLB | 250.00 | 0.72 | 2.96 | 0.00 | 0.00 | 5.00 |
| FHLMC | 500.00 | 1.45 | 1.20 | 0.00 | 0.00 | 5.75 |
| FNMA | 215.00 | 0.63 | 1.25 | 0.00 | 0.00 | 5.25 |
| GLDGEN | 500.00 | 1.11 | 10.55 | 0.00 | 0.00 | 5.63 |
| GS | 380.00 | 1.10 | 0.96 | 1.04 | 100.00 | 5.25 |
| NDSHSG | 1,000.00 | 2.92 | 9.66 | 0.00 | 0.00 | 5.60 |
| SFOFAC | 250.00 | 0.77 | 7.19 | 0.00 | 0.00 | 5.20 |

The analysis is provided for informational purposes and the accuracy is not guaranteed. Market prices are indications only and subject to change. Market values include accrued interest.

Trindel-20240416 Visual Analysis (Using 04/16/24 Portfolio Data)

Par Amount (\$000): 34,667.92 | Mkt Vlu (\$000): 34,422.81 | Gain/Loss (\$000) Using Amort Cost: (53.43)



The analysis is provided for informational purposes and the accuracy is not guaranteed. Market prices are indications only and subject to change. Market values include accrued interest.

Trindel-20240416 Holdings X-Ray Analysis (Using 04/16/24 Portfolio Data)

Portfolio: [Trindel-20240416](#)

- Minimum YrsToMat:
- Maximum YrsToMat:
- Ticker Filter: **All**
- Structure Filter:
- Composite Rating Filter:
- Minimum Effective Duration:
- Maximum Effective Duration:
- Forecasted Matured/Called Bonds: **No Forecast Filter**

[/Cols=Holdings](#)

| Treasury Curve | 04/16/24 | Tsy CMT Yield | 1 Day Chng(bp) | 1 Mo Chng(bp) | 1 Yr Chng(bp) | Slope(bp) | Sprtd to 3Mo(bp) |
|--------------------------|----------|---------------|----------------|---------------|---------------|-----------|------------------|
| Fed Funds Effective Rate | | 5.330 | | 0.000 | 50.000 | 0 | 0 |
| 3MoTsyCMT | | 5.410 | | (7.000) | 27.000 | (9) | (9) |
| 6MoTsyCMT | | 5.320 | | (6.000) | 29.000 | (32) | (41) |
| 1YrTsyCMT | | 5.000 | | (5.000) | 23.000 | (35) | (76) |
| 2YrTsyCMT | | 4.650 | | (7.000) | 57.000 | (35) | (111) |
| 5YrTsyCMT | | 4.300 | | (3.000) | 70.000 | 1 | (110) |
| 10YrTsyCMT | | 4.310 | | 0.000 | 79.000 | 16 | (94) |
| 30YrTsyCMT | | 4.470 | | 4.000 | 73.000 | | |

| Bond # | Bond Description | Purchase Price [99.545] | Purchase Date | Bid Price [99.414] | Yield To Convention [5.497] | Issuer Info | Gain/Loss (\$000) Using Amort Cost [53.43] | Effective Duration [0.624] | Purchase Yield [5.476] |
|--------|--|-------------------------|---------------|--------------------|-----------------------------|--|--|----------------------------|------------------------|
| 1 | 30.873MM CASHCAMP: CASH | 100.00 | | 100.00 | 5.48 | CASH | 0.00 | 0.00 | 5.480 |
| 2 | 0.380MM 38150AZ3: G55.25 03/30/26 (1.96Yr FIN-A3) | 100.00 | 03/28/24 | 99.686 | 5.42 | Financial AZ BBB+ A 5Yr Def %: 1.04 EqyBuyHld%: 100.0 Outlook (Mdy/S&P) STABLE/STABLE | (1.193) | 0.962 | 5.250 |
| 3 | 0.215MM 3135GAQ6: FNMA5.25 03/02/27 (2.88YrsNc7.53Mos-1x) | 100.00 | 04/03/24 | 99.637 | 5.386 | AgyCbl JX Aaa AA+ | (0.78) | 1.246 | 5.250 |
| 4 | 0.250MM 3130BQOP: FHLS.00 04/02/29 (4.96YrsNc1.96Yrs-Da) | 100.00 | 04/03/24 | 99.248 | 5.173 | AgyCbl Discrete Aaa AA+ | (1.88) | 2.96 | 5.000 |
| 5 | 0.500MM 3134HIZQ: FHLMCS.75 04/05/29 (4.97YrsNc2.63Mos-Dm) | 100.00 | 04/05/24 | 99.709 | 5.818 | AgyCbl Discrete Aaa AA+ | (1.455) | 1.203 | 5.750 |
| 6 | 0.700MM 13080SES: CASGEN2.34 04/01/32 | 81.269 | 04/04/24 | 79.426 | 5.576 | Muni BANK OF AMERICA MERRILL A- A Outlook (Mdy/S&P) //S | (13.323) | 6.986 | 5.239 |
| 7 | 0.250MM 79772EEQ: SFOFAC5.885 09/01/35 | 104.612 | 04/04/24 | 104.612 | 5.198 | Muni STIFEL NICOLAUS & CO AAA+ Outlook (Mdy/S&P) / | 0.039 | 7.189 | 5.200 |
| 8 | 0.500MM 38122NDS: GLDGEN3.714 06/01/41 | 79.047 | 03/25/24 | 74.787 | 6.108 | Muni JEFFERIES LLC A- Outlook (Mdy/S&P) / | (21.541) | 10.55 | 5.632 |
| 9 | 0.500MM 6589096V: NDSHSG5.781 07/01/44 | 101.36 | 03/26/24 | 99.997 | 5.78 | Muni RBC CAPITAL MARKETS LLC Aaa I Outlook (Mdy/S&P) / | (6.768) | 9.371 | 5.590 |
| 10 | 0.500MM 6589096W: NDSHSG5.861 07/01/49 | 101.722 | 03/26/24 | 100.406 | 5.802 | Muni RBC CAPITAL MARKETS LLC Aaa I Outlook (Mdy/S&P) / | (6.527) | 9.944 | 5.619 |

The analysis is provided for informational purposes and the accuracy is not guaranteed. Market prices are indications only and subject to change. Market values include accrued interest.

Matrix Cross Sectional Analysis

Starting Yrs-Edur: **0.000**
 Portfolio: **Trindel-20240416**

Yrs-Edur Bucket Size: **1.000**
 Portfolio: **Trindel-20240416**

Maximum Yrs-Edur: **30.000**
 Portfolio: **Trindel-20240416**

| Using Custom Buckets | All Par(\$000) | | | All % MktVlu | | | All SubSet PylD | | | All Weighted SubSet PylD | | |
|----------------------|-----------------|--------------------|-------------------|--------------------|-------------------|--------------------|-------------------|--------------------|-------------------|--------------------------|-------------------|--------------------|
| | Yrs To Maturity | Effective Duration | Years To Maturity | Effective Duration | Years To Maturity | Effective Duration | Years To Maturity | Effective Duration | Years To Maturity | Effective Duration | Years To Maturity | Effective Duration |
| 0.000 - 1.000 | 30,872.92 | 31,252.92 | 89.053 | 90.149 | 5.48 | 5.477 | 4.88 | 4.938 | 5.48 | 5.477 | 4.88 | 4.938 |
| 1.000 - 2.000 | 380.00 | 715.00 | 1.096 | 2.062 | 5.25 | 5.60 | 0.058 | 0.115 | 5.25 | 5.60 | 0.058 | 0.115 |
| 2.000 - 3.000 | 215.00 | 250.00 | 0.62 | 0.721 | 5.25 | 5.00 | 0.033 | 0.036 | 5.25 | 5.00 | 0.033 | 0.036 |
| 3.000 - 4.000 | 0.00 | 0.00 | 0.00 | 0.00 | 5.50 | | | | 5.50 | | 0.119 | |
| 4.000 - 5.000 | 750.00 | 0.00 | 2.163 | 0.00 | | | | | | | | |
| 5.000 - 6.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 6.000 - 7.000 | 0.00 | 700.00 | 0.00 | 2.019 | 5.239 | 5.239 | | | 5.239 | 5.20 | 0.106 | 0.106 |
| 7.000 - 8.000 | 700.00 | 250.00 | 2.019 | 0.721 | 5.239 | 5.20 | 0.106 | 0.037 | 5.239 | 5.20 | 0.106 | 0.037 |
| 8.000 - 9.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 9.000 - 10.000 | 0.00 | 1,000.00 | 0.00 | 2.885 | | | | | | | | |
| 10.000 - 11.000 | 0.00 | 500.00 | 0.00 | 1.442 | | | | | | | | |
| 11.000 - 12.000 | 250.00 | 0.00 | 0.721 | 0.00 | 5.20 | 5.632 | 0.037 | 0.081 | 5.20 | 5.632 | 0.037 | 0.081 |
| 12.000 - 13.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 13.000 - 14.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 14.000 - 15.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 15.000 - 16.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 16.000 - 17.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 17.000 - 18.000 | 500.00 | 0.00 | 1.442 | 0.00 | 5.632 | | 0.081 | 0.081 | 5.632 | | 0.081 | 0.081 |
| 18.000 - 19.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 19.000 - 20.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 20.000 - 21.000 | 500.00 | 0.00 | 1.442 | 0.00 | 5.59 | | 0.081 | 0.081 | 5.59 | | 0.081 | 0.081 |
| 21.000 - 22.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 22.000 - 23.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 23.000 - 24.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 24.000 - 25.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 25.000 - 26.000 | 500.00 | 0.00 | 1.442 | 0.00 | 5.619 | | 0.081 | 0.081 | 5.619 | | 0.081 | 0.081 |
| 26.000 - 27.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 27.000 - 28.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 28.000 - 29.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |
| 29.000 - 30.000 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | | |

The analysis is provided for informational purposes and the accuracy is not guaranteed. Market prices are indications only and subject to change. Market values include accrued interest.



TRINDEL SPECIAL BOARD MEETING

May 2024

REPORTS

AGENDA ITEM 6.

SUBJECT: Review of Member Satisfaction Survey.

ACTION FOR CONSIDERATION: Informational item.

BACKGROUND: At the 2022 Strategic Planning session the #1 Organizational Goal was to create a member satisfaction survey to address responsiveness, expertise, productivity, services, and accessibility as a 2- year goal.

Trindel staff created survey questions for the Administration, Risk Control, Property and Liability Claims, and Workers' Compensation Claims departments. The surveys were sent out to the key contacts for each department including the Board of Directors, County Counsel, Risk Managers, Human Resources, and Safety.

FISCAL IMPACT: N/A

RECOMMENDATION: N/A

Trindel Administration Survey - February 2024

13 responses

[Publish analytics](#)

What is your most important priority when contacting Trindel Insurance Fund?

12 responses

Quick response.

Receiving accurate information in a timely manner.

Follow up. Reliability. Customer Service.

Financial Information

My most important priority is a timely response

To receive information and guidance about any topic of concern (within Trindel's scope of expertise) and a response as fast as reasonably possible to clarify the request

Receiving prompt responses and accurate information from friendly staff

Timely response and timely case management.

Liability/property claims & litigation

To be able to get ahold of Andy, usually.

Get a specific answer from a qualified individual

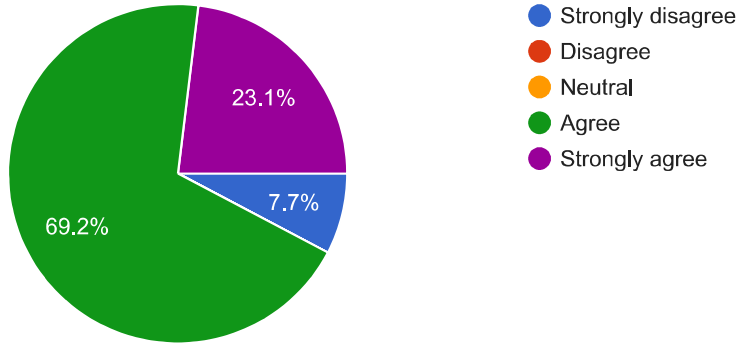
Timeliness and correct information.





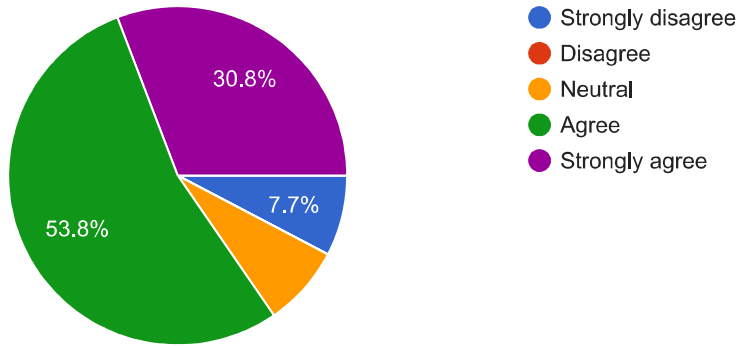
The Administration team strongly embodies Trindel's culture of being good stewards of public funds, provides options for the most cost-effective risk financing mechanisms, and prudently invests the members money for the benefit of the County.

13 responses



The Administration Department is moving the organization toward the vision of being the preeminent risk management source for California Rural Counties.

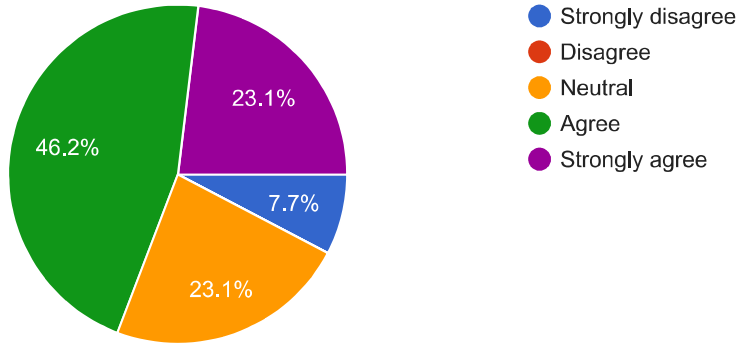
13 responses





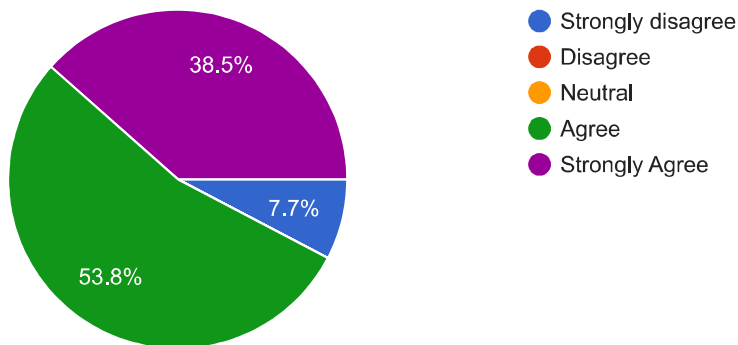
The Board meetings are an environment where everyone is welcome, encouraged to participate, and part of a team moving toward a common goal. Staff provides enough information, and options, in a transparent fashion to enable the Board of Directors to make well informed decisions.

13 responses



As a Trindel member County, you feel like you receive proper support from the Administration team, and you get what you need, when you need it.

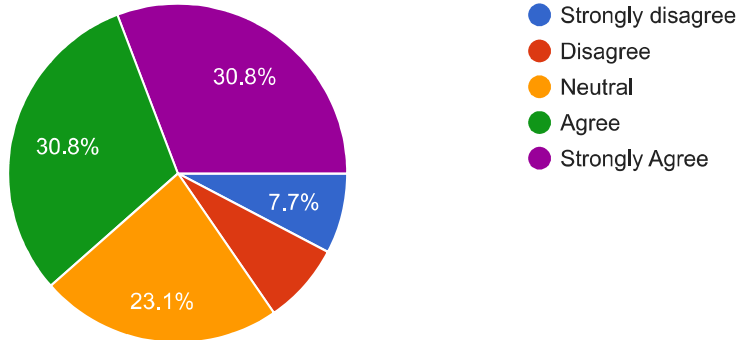
13 responses



The Administration team provides the proper amount of presence in my County.



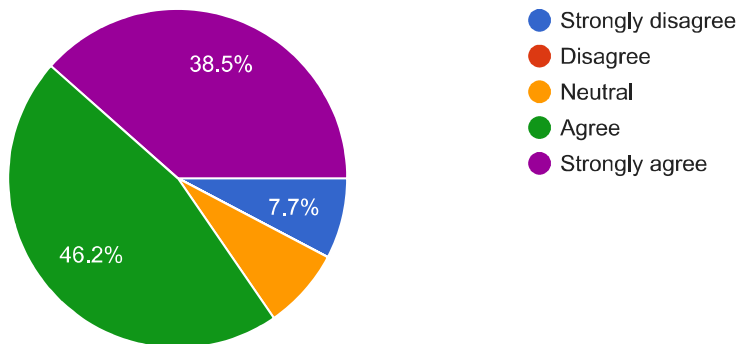
13 responses



The Administration team effectively utilizes Financial Auditors, Actuaries, Insurance Brokers, HR Professionals, Attorneys, and Investment Advisors.



13 responses



Room for additional comments, if any.

4 responses

n/a

We need a revised plan to address the Worker's Comp issues.

My only response is to be more culturally sensitive and aware at Board meetings as we need to be the example to all counties present.



How can our employees better support your operations

7 responses

n/a

I always receive excellent service form all Trindel staff.

Provide more timely audited financials. They used to be provided in Oct/Nov and now they are not available until March or later.

Thank you for your interface and communication with Prism

Better communication, more frequent claims status updates, better follow through with outside attorneys, etc. handling matters on our behalf.

I think they're doing an awesome job.

Continue to interact with the county's regularly.

Do you feel Trindel is a cost effective risk management tool? Please explain your response

9 responses

Yes. They effectively manage all aspects of the wc/ liability and property insurance issues.

Yes. Mainly keeping W/C and training, in house.

Yes

I believe it is as many of our resources are in house so we dont have to outsource as much as normally would.

yes, when claims are settled as fast as reasonably possible.

Yes. I feel the options outside of Trindel would be much more costly.

Yes, no one else comes close.

Yes. Absolutely.

Yes, they effective at getting involvement to reduce liability and claim through their resources.



What is an area that the Administration team could improve in?

5 responses

n/a

more fishing days?

Coordinating, monitoring, evaluating claims management.

Cross-cultural training which needs to be a theme for North State counties even though a high percentage of employees are "white." New workers are younger and more diverse. We need to be ready as an organization and help prepare the counties we serve.

Any other comments you would like us to know that would better help us serve you.

5 responses

n/a

You guys do a fantastic job in supporting Colusa County.

I think the current Trindel staff is excellent and as one Board member, I feel we are lucky to have Andrew, Jack and the rest of the team.

I appreciate the assistance I've received through Trindel - everything from advice on how to untangle financial affairs at my county to legal assistance with delicate situations that could blossom into full-blown lawsuits.

No.

This content is neither created nor endorsed by Google. [Report Abuse](#) - [Terms of Service](#) - [Privacy Policy](#)





Trindel Property and Liability Survey - February 2024

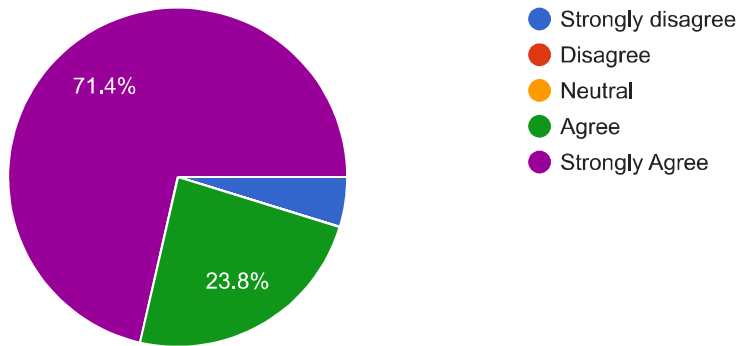
21 responses

[Publish analytics](#)

 Copy

The Property and Liability Claims Department strongly embodies Trindel's culture of being good stewards of public funds in the handling of your claims, and looks out for the best interest of the County.

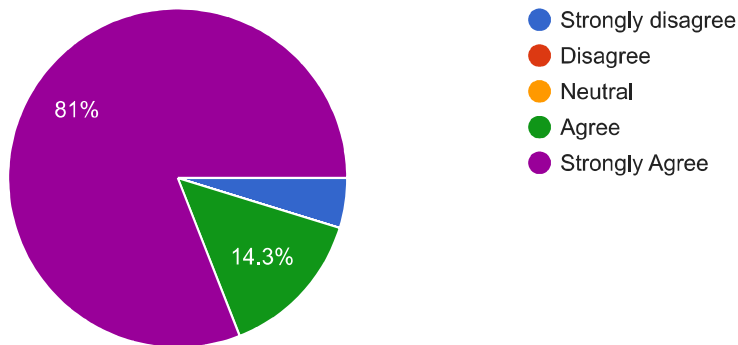
21 responses



 Copy

The Property and Liability Claims team handles your claim timely, communicates promptly, clearly, and effectively, and is easy to work with.

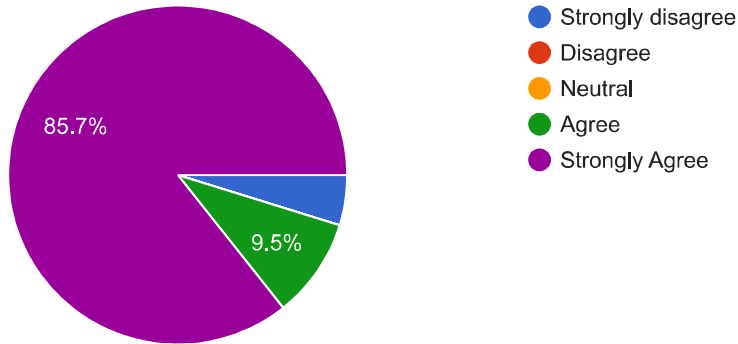
21 responses





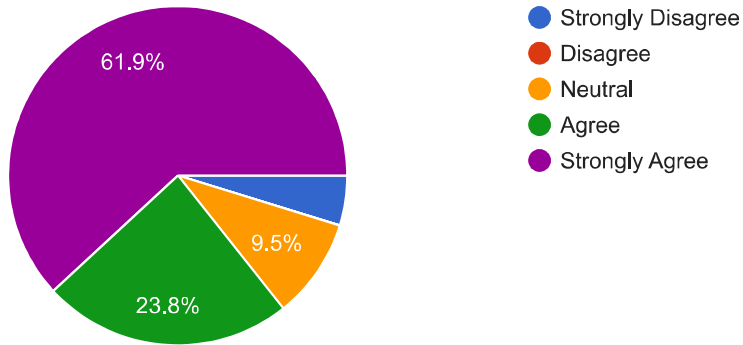
You have a good working relationship with the Property and Liability Claims Team, and feel that you receive proper support and information as well as enough in person/Zoom meetings to handle your claims effectively.

21 responses



Your Property and Liability Claims team provides you with the best attorneys, and you are satisfied with the legal guidance provided.

21 responses



Room for additional comments, if any.

7 responses

I appreciate Sean and Penny so much! The response time and their attention to my needs is much appreciated. They always go above and beyond.

n/a

The relationship between Trindel, the county, and outside counsel can be tricky to navigate. Since Trindel is paying the invoices and contracting with the outside counsel, at times, it feels like County Counsel's litigation oversight role is minimized. Having said that, I almost always defer to the knowledge and expertise Trindel holds. I have been able to call immediately to directly discuss concerns. That is greatly appreciated.

They stay on top of these cases and ping me when I get behind too. They teach as they go by explaining their reasons for requests, etc. Because they are so on top of the cases, it seems like claims/litigation are being resolved faster than before we were with Trindel. (I don't have data to confirm but that's how it feels).

None.

Although I do not participate directly in claims, I understand Trindel puts forth some of the best service and third-party attorneys money can buy.

I have never had an issue with getting a response from the Property and Liability team. Both Sean Houghtby and Andrew Fischer have been excellent resources.



What area does the Property and Liability claims team perform best in?

11 responses

Knowledge and customer service

Having patience with their contacts at the County! I appreciate that the team understands that we are waiting just as eagerly for information as they are.

Communication

Following up with the client

Response

Strong lines of communication and accessibility.

Collaboration and selecting counsel.

Claims/litigation mgmt - they don't let cases get stale. Great job.

Very responsive and helpful. Sean has been great with our old court house fire situation.

The team are great communicators and stay on task to ensure claims are handled timely and routed to proper support and legal assistance.

Reserving is hard and they do a good job of estimating and updating as things transpire. They seem proactive.



What is an area that the Property and Liability team could improve in?

8 responses

unsure

N/A

I would like to see the dept grow. Sean and Penny are handling it now but they have full plates, I dont want them to get burned out.

n/a

When case appropriate, I would like to use local law firms as outside counsel.

Trends across all Trindel counties and possible recommendations on how to reduce property and liability risk, in a best practices or lessons learned type format/document.

Everyone does a great job!

Continue to grow and learn in this never ending hard market.

Any other comments you would like us to know that would better help us serve you.

4 responses

n/a

I'm very grateful for their expertise and hard work. Process works well.

A general comment for all departmental areas: Trindel is growing and it would be nice to be introduced to the new team members so I know who to speak with. :) Everyone does a great job!

Keep up the good work.

This content is neither created nor endorsed by Google. [Report Abuse](#) - [Terms of Service](#) - [Privacy Policy](#)





Trindel Risk Control Survey - Feb 2024

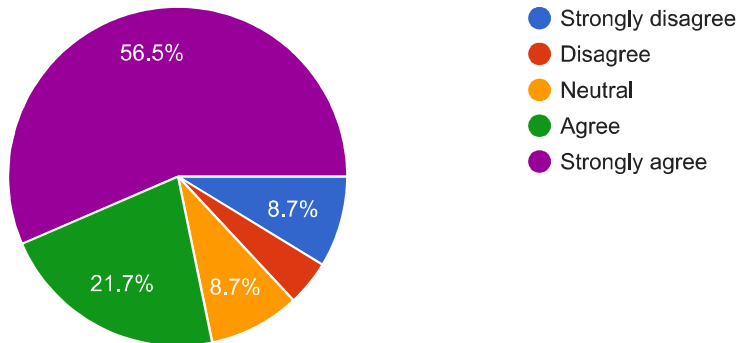
23 responses

[Publish analytics](#)

The Risk Control team strongly embodies Trindel's culture of being good stewards of public funds, and utilizes them in a fashion to prevent losses in your County.

 Copy

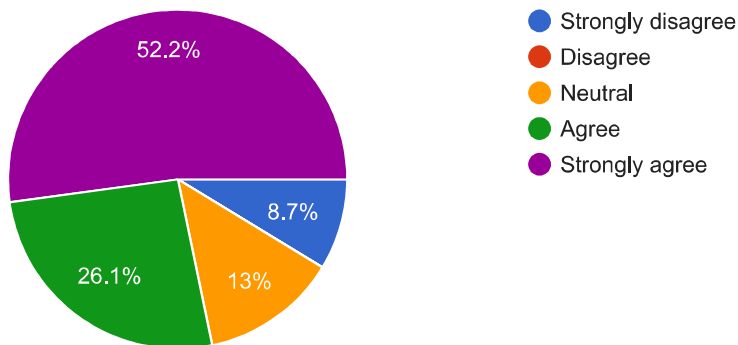
23 responses



The Risk Control team provides trainings that are timely, and relevant, that have a positive impact on your safety and leadership culture.

 Copy

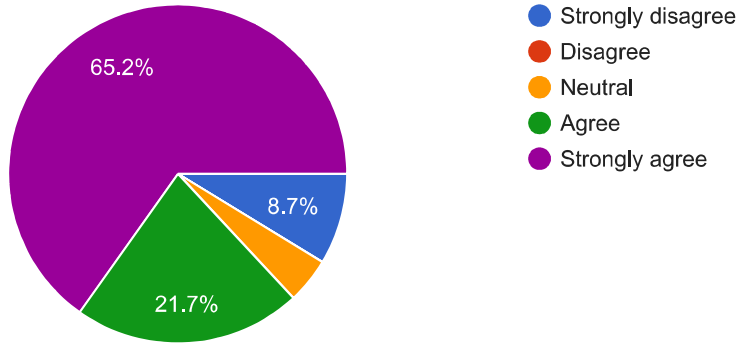
23 responses





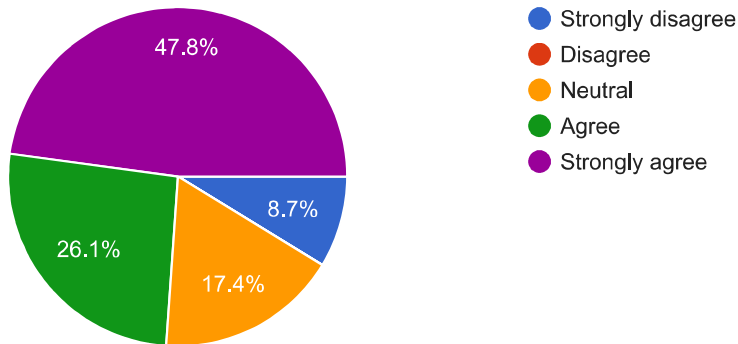
The Risk Control team promotes an environment where you feel welcome, and part of the team moving toward a common goal as HR/Safety/Risk professional.

23 responses



As an HR/Loss Prevention/Risk professional in a Trindel member County, you feel like you receive proper support from the Risk Control Team.

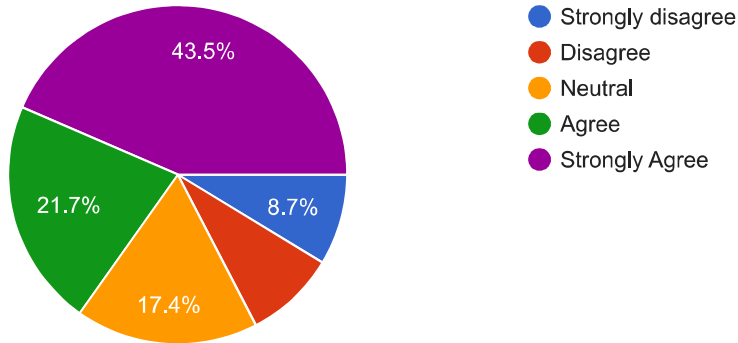
23 responses





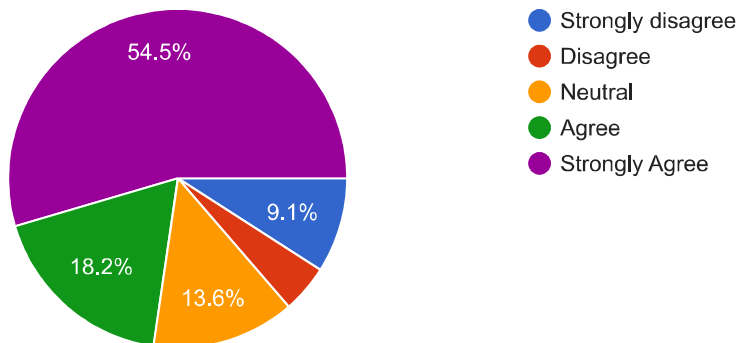
The Risk Control team provides the proper amount of in-person & Webinar trainings for my County.

23 responses



The Risk Control team is responsive to my requests, and provides excellent advice.

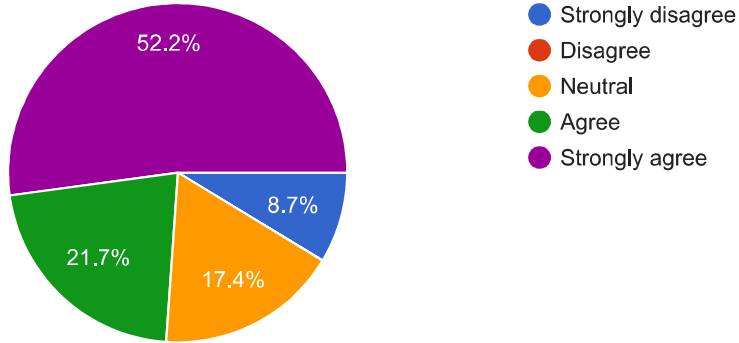
22 responses





The Risk Control team employs the proper use of subject matter experts to help reduce Trindel covered losses for my County.

23 responses



Please provide additional comments, if applicable.

14 responses

I think the team does an amazing job. No matter how busy they are, they make time to help. I probably would like to see another person added to the team to help balance them out so they don't get burned out, especially with the possibility of being a team member short soon.

I would like to see more subject matter experts on the training calendars. I know our county has for years already created a robust category of trainings quarterly. However Trindel offering these to all member counties at once could be very valuable for the price/time.

It has been such a pleasure and an enormous help to join forces with Trindel. The Risk Control Specialists and WC examiner all do a very nice job for us and are a treasure.

If you want genuine, unfiltered responses than consider making this survey anonymous. Requiring an email to respond is going to give you only those items people are willing to share versus what you are probably very interested in discovering from an effectiveness of services perspective.

Most amazing group of people outside my office I have ever worked with.

They do a great job. Our county get so much more support as a Trindel county than we did prior to joining Trindel. The result for our county has been a significant increase in Safety Awareness, and a excitement from the DSRs.

I appreciate the updated website and the expanded, improved and targeted training programs.

Risk team has been very instrumental in San Benito County's Lunch and Learn training series. They also have provided good materials and insight with legislative changes, etc.

n/a

Would love to see more in person training. Very easy to get interrupted and distracted in webinars.

Calendar invites with set dates for the spotlight would be good, every 3rd Thursday of the month etc. Last minute invites are difficult to accommodate.

None.

Very easy to work with

March, April and May training flyers were released in January or February and that was very helpful. I received a lot of feedback from employees that it's easier to attend trainings with the



schedule available so far in advance.



How effective do you believe our webinar and in-person trainings are?

19 responses

Very Effective

They are good and effective. Its nice to have access to them as needed when needed.

I believe they are effective when they can collaborate with the individual county on what they are looking to achieve or if the training is being requested for a specific reason etc. I would also like to be sure they trainings have been reviewed prior to presenting. Many times I know they have actually been updated recently, however some are a bit older.

Effective, presented well, and provide in recorded format that is so essential to reach our entire supervisory team. Thank you all very much.

Wonderfully effective. Our County especially appreciates the ability to review the recorded training at a time convenient for our employees.

I feel that the in-person trainings are better for our employees. Some webinar trainings are good.

Highly effective and the webinar option is much appreciated for our area and staffing shortages to be able to attend.

Personally, I would love to see more IN-person trainings take place here at the County on important Supervisor-specific topics such as moving from peer to supervisor, how to have difficult conversations with relevant risk-related examples. With enough advance notice we can books rooms to accommodate larger participation. We find (through participant feedback) that our folks respond better to live training than online.

Very, training manageable time periods for supervisors and staff. Recordings so helpful. Come out and do in person when requested. Wonderful.

Very good. People are able to get the information when their individual schedules allow.

I appreciate the that the team still offers regular webinars each month and makes the recording links available to view for employees that otherwise would be unable to attend. This is especially helpful during the winter months when weather impedes in-person attendance. In-person trainings are always very interactive and receive positive feedback from attendees. If there is one critique

Very effective.



In person training is the most effective but everyone needs their own learning style met.

I must admit I can easily be distracted in a webinar. I would learn much more in person. However the recordings are nice to watch after a webinar so I do appreciate that.

Always good information

Recorded webinar trainings are a joke. Live webinar trainings are Ok. Haven't attended an in-person training in years. People too busy saving money and not "exposing" each other for trainers to travel apparently.

I think they are great. The information material is always relatable to our work situation. I learn a lot and the written materials that I can keep in my Trindel Trainings folder are valuable as a reference. The trainers are always enthusiastic and make the training pleasant.

good

There are a lot of leadership, Anti-Harassment, and Defensive Driving Trainings. I would like to more required/safety trainings such as: Bloodborne Pathogens, Public Service Ethics, Aerosol Transmissible Diseases, Asbestos Awareness, etc.



What area does the Risk Control team perform the best in?

16 responses

n/a

General assistance and answering questions

They are very responsive, polite, and able to help you solve problems.

Webinars in HR and in person loss prevention such as stop the bleed, flagger safety, chain saw safety, team building, and more. Thank you for providing conferences, hotels, food, training, and more.

Responsiveness to our individual county's inquiries/needs. For example, your team has created a customized training anytime I have asked for something Trindel wasn't already offering. When I had requested LEAP posters, Becca made it happen within a matter of days.

In-person trainings

The team excels in everything they do.

Training, knowledge, interpersonal skills, conferences

I am amazed at how much they get done. They are very good at staying on top of changes, trends, risks and react quickly to get the word out to member counties.

I believe the team has strong communication skills and are very knowledgeable of their subject matter and statistical risk trends.

Provides good materials and resources.

Subject knowledge.

Unsure.

Setting up webinar trainings.

Employee relations.

unknown, I have dealt with training and auto issues



What is an area that the Risk Control team could improve in?

19 responses

n/a

I think presentation skill or professionalism could be an area for improvement I have received some feedback from staff that the presentation was almost to "childish" or to "casual." Being personable of course is one thing but if the professionalism doesn't come through many times that can be mistaken for not being knowledgeable. I do believe your team has the knowledge and some the real like experience to guide us also.

So hard to say. More training on how to read WC reports regarding liability costs, trends, areas we need to focus on based on claim history. How to read loss runs.

In-person trainings

Possible providing more outside Speakers for trainings.

We would love to see more regular updates on pending issues. We have had folks out on W/C leaves and it would be great to have bi-weekly or monthly updates, so that we don't have to chase claims status.

Developing marketing materials that are more engaging and effective to motivate employees to enroll in training programs.

Nothing I can think of at this time.

I don't have any suggestions. They do a great job.

The team has already made significant strides to improve services. The new website presence, the annual audit process and expanded training programs are great examples of improvements in progress.

None at this time.

Unsure

EAP sessions, Health benefits

Responding to email and phone calls in a more timely manner.



I can't identify anything specific.

unknown

There have been many times when there is a training scheduled and the host has not arrived on time. I understand that things happen and everyone is busy but it creates a domino effect; if the host is a couple minutes late I get bombarded with calls and emails from employees waiting for the training to start. Our County is very short staffed and some days every minute counts.



Do you attend any of our in-person conferences? How would you rate your conference experience?

18 responses

n/a

I have not yet but will be attending in the next 2 months. I did attend parma and it was great to go with the team and to be able to ask questions as I was learning.

Yes I do and I think they are great! I have never had more smooth travel or communication before and during the events.

Yes I do. I would rate them 5 out of 5.

Yes. It has been my experience that Trindel conferences are well thought out and organized.

Your conferences are five-star. I come away with valuable information to bring back to our county.

All that I can, and the experiences are always great! The interaction they provide with other member counties is invaluable as well.

Due to conflicting scheduling and being short-staffed - not yet, but definitely would love to!

Yes Excellent

Great - They make it very easy for reps from member counties. Conferences are designed to help attendees network and get information they need.

Yes. The conferences have really improved in the last few years. The guest speakers and topics have been very relevant and the ability to share experiences with other member counties is invaluable. 10 out of 10. I also appreciated that recording links for key sessions were provided for those who could not attend in person.

Recent conference in Redding was very informative for me.

Yes and good.

yes, good information. The hotel was a bit dirty and the food was not vegetarian friendly



Never heard of one.

I have not attended any of the in-person conferences.

not yet

6/10



What member services do you currently use if any? For example, EAP, LEAP programs etc., and how effective are they?

16 responses

n/a

none, but I strongly believe in their effectiveness when used.

We are not currently using either.

TC does not use the EAP because we have a good EAP with a lot of other services such and legal advice, financial, data collecting services, and more . We use LEAP.

EAP and LEAP. Very effective for our employees.

We use them all! I wish there were more providers closer to our area, but that is no fault of Trindel.

LEAP we are getting the word out more and more and Vicki has been on site at Probation

LEAP, help with Safety Audits, Risk Control Audit: Trindel does everything possible to help us be successful. I have had the opportunity to do Safety Audits with Tony and Becca. I have learned a lot . The Audits are scary as we prepare but also a great way to drive home key points.

I have not used the services, but employees that have shared a positive experience.

EAP. Only wish is San Benito Co. could find more providers in our area.

LEAP

None

We need more EAP allowance 3 sessions is just not adequate for anything.

Don't know what these services can provide.

I use EAP. It is helpful.



What member services would you like to see expanded?

9 responses

n/a

CalOSHA compliance help. I have asked many times for a list of expected or required policies/procedure's (I know there is a bunch) that we need to have. I feel like once that list is made for one county it will likely be able to be used across all/most. This is the area I struggle most with as I am not a safety expert. Policy review or writing would also be huge! As we know most litigation goes back first to our polices and procedures. I would also like to see some guidance on hot topic areas for litigation such as ADA, Retaliation and more.

Guidance creating safety programs such as industrial return to work. WC related topic trainings. Understanding the WC costs. Suggestions to improve WC process and programs in place.

Just EAP providers.

EAP, Gym Membership group discounts

How about doing a better job informing employees of the services available and what they provide. Then go from there.

Maybe more safety training for positions that do more physical jobs (roads, park maintenance) to prevent injuries. Please disregard if this is already occurring and I am unaware of it.



Any other comments you would like us to know that would better help us serve you.

14 responses

n/a

None.

Keep up the great work. I feel truly lucky to have the team as a resource.

A new LSTP logging system would be amazing or a new training LMS (not Target Solutions) would be valuable for updated training and tracking.

Thank you for all that your team provides to our County.

I feel that Risk Control has come so far with services and am very proud of the Team that has been built.

You guys are great to work with.

Providing in-person trainings, especially in the area of leadership development, would be fantastic.

Thank you

Thanks for all you do.

none

No.

This content is neither created nor endorsed by Google. [Report Abuse](#) - [Terms of Service](#) - [Privacy Policy](#)

Google Forms







TRINDEL SPECIAL BOARD MEETING

May 2024

REPORTS

AGENDA ITEM 7.

SUBJECT: 7. Executive Director Evaluation of Performance: Pursuant to CA Gov. Code section 54957.

ACTION FOR CONSIDERATION: N/A

BACKGROUND: N/A

FISCAL IMPACT: N/A

RECOMMENDATION: N/A



TRINDEL SPECIAL BOARD MEETING
May 2024

REPORTS
AGENDA ITEM 8.

SUBJECT: Adjournment

Time:

ACTION FOR CONSIDERATION:

BACKGROUND:

FISCAL IMPACT: N/A

RECOMMENDATION: N/A