



**SELF Hires New CFO**

**Fills Accounting Specialist Position**



Schools Excess Liability Fund was pleased to welcome Debra Fisher as its new Chief Fiscal Officer in October.

Debra brings 30 years of accounting experience to the organization, with 15 years of that spent as Controller at Santa Clara County Schools’ Insurance Group—a longtime SELF member.

She will be responsible for SELF’s day-to-day financial operations, the annual budget and audit as well as the management of SELF’s investment portfolio, among other duties.

SELF conducted a lengthy search for just the right candidate to fill the CFO spot, said Chief Executive Officer Eric Lucas.

“We were looking for just the right combination of qualifications and experience to take the helm of SELF’s financial operations and continue to provide the membership with the high level of service and expertise they have come to enjoy and expect,” Lucas said. “Debra fits that bill to a ‘T’.”

James Marta & Company LLP has been handling the CFO duties since the position became vacant last year.

Debra received her bachelor’s degree in Business Administration and Accounting from San Jose State University and her Master of Business Administration degree from California State University, Hayward.

Debra said she is excited to be joining the SELF management team and looks forward to working with the SELF Board, members and staff.



SELF also hired Teresa Thompson in September to fill the Accounting Specialist position that was vacated with the departure of Melissa Willingham in August.

Teresa spent the last 29 years working in private industry for Pasco Scientific in Roseville, California. During her tenure there she worked her way up to Accounting Supervisor and then Senior Accountant, a position she held for the last 10 years.

She holds a bachelor’s degree in Accounting from San Jose State University.

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**Conferences & Events**

**DECEMBER**  
**CSBA Annual Education Conference**  
 December 14-16, San Francisco

**JANUARY**  
**School Services of California, Inc. Governor’s Budget Workshop**  
 January 14 & 15, Ontario & Sacramento

**ACCCA Governor’s Budget Workshop**  
 January 14, Sacramento

**MARCH**  
**CASBO Annual Conference**  
 March 30 - April 2, San Diego

**About Us**

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**Our Mission**

SELF is a member-owned, statewide partnership of public educational agencies providing quality pooled programs for excess coverage that benefit our students.

**By the Numbers**

SELF is the leading statewide excess liability provider for California’s public schools and colleges, serving nearly 3 million students.

**SELF Awareness**

Comments should be sent to the above address or [info@selfjpa.org](mailto:info@selfjpa.org).

**Board**

- Area II Adam Hillman
- Area III Richard Hare
- Area V Cathy Reineke  
Dave George
- Area VI Nancy Anderson  
Diane Crosier  
Tony Nahale  
Eva Lueck  
Toan Nguyen  
Karla Rhay

**Community Colleges**

Michael Gregoryk, John Didion,  
 Teresa Scott, Kevin McElroy

## Praesidium Policy Services Inducted into SELF Risk Services Clearinghouse

The SELF Board inducted a new member into the SELF Risk Services Clearinghouse at its June meeting.

Praesidium Abuse Prevention Policy Services can provide SELF members with a model set of policies to address the unique abuse risks in the school setting. Alternatively, Praesidium can conduct an extensive review of a district's existing policies to determine what works, what needs fine tuning and what is missing.

The next step in the review process is working to develop policies that permit the district to accomplish its mission while prohibiting behaviors most commonly associated with abuse in the types of programs it operates. For each policy, Praesidium will provide an educationally sound rationale to help everyone in your organization understand its importance and comply with its implementation.

Active SELF members will receive an exclusive 5 percent discount on policy services as well as all of Praesidium's other services—including its Armatus online training, background checks and Accreditation services.

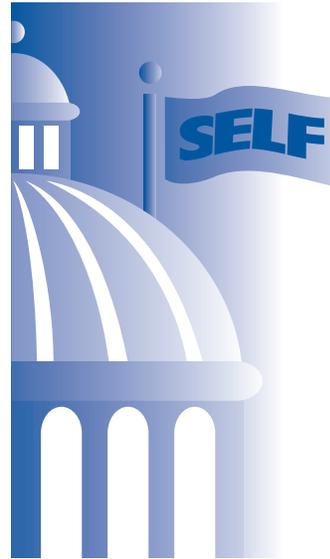
For more information about Praesidium go to [www.PraesidiumInc.com](http://www.PraesidiumInc.com) or visit the SELF Risk Services Clearinghouse on our website at [www.selfjpa.org](http://www.selfjpa.org) and check out the other product recommendations to members.

The SELF Risk Services Clearinghouse provides endorsement of approved products that further the interests of SELF and the quality of education and/or environment for students and staff.

As a statewide joint powers authority, SELF holds a unique position that allows access to a wide variety of educational entities across the state. With an eye on claim trends, SELF can direct its members to certain superior products or services that may be beneficial to promoting safety and loss prevention.

SELF evaluates risk and safety related products suggested by vendors, members or others to determine if inclusion in SELF's clearinghouse is appropriate based upon the following five key qualities:

- Measurable results—improves safety for students, staff and public
- Cost effective—value and affordability
- Evaluation of operation—quality, qualified management
- Preferred arrangement available to SELF members when possible
- Alignment with SELF's core values and goals



## Legislative Update

### School Services of California, Inc.

The long campaign season came to an end in November with the easy re-election of Governor Jerry Brown. California voters gave Governor Brown an historic fourth term with nearly 60% of the vote.

In the most significant ballot outcome for school districts, Proposition 2 was approved by voters by a margin of 69% - 31%.

While the initiative only recently crested the 50% approval mark in pre-election polls, Proposition 2 turned out to be the election item that garnered the most affirmative votes, with 3.43 million voters approving, compared to 3.38 million approving Proposition 1 and 3.05 million voting for Governor Brown.

In other election news, Superintendent of Public Instruction Tom Torlakson won re-election in a fiercely fought battle against challenger Marshall Tuck, garnering 52% of the vote to Tuck's 48%. According to current figures, this was the most expensive race in the state with significant support for Torlakson coming from the California Teachers Association and significant support for Tuck coming from the business and education reform community.

While Democrats swept the statewide offices, the Party suffered losses in the Legislature as voters selected Republican candidates in several targeted legislative races across the state. However, Democrats will maintain a strong majority in both houses in the next legislative session, but without a supermajority; as of current election results, Democrats will hold 52 seats of 80 seats in the Assembly and 25 seats of 40 seats in the Senate.

As in years past, there will likely be a game of musical chairs as sitting legislators leave for other offices: Senators Mark DeSaulnier (Senate District [SD] 7, D-Concord) and Steve Knight (SD 21, R-Palmdale) will vacate their seats for Congress this winter, which will probably entice local Assembly Members to try their hand at the "upper house." There will also be a special election this fall to elect a representative for SD 35, left vacant with Rod Wright's departure.

## KMTG Legal Alert

### Child Abuse and Neglect Mandated Reporter Training Will Be Mandatory Starting January 1, 2015

Effective January 1, 2015, AB 1432 requires school districts, county offices of education, state special schools and diagnostic centers operated by the State Department of Education, and charter schools to provide annual training to all employees and persons working on their behalf, who are mandated reporters, as defined in Section 11165.7 of the Penal Code.



Per AB 1432, the training requirement may be satisfied by using an online training module to be provided by the State Department of Social Services or through other training sources as long as the school district, county

office of education, state special schools or diagnostic centers, reports to the Department what training has been used in place of the online training module.

All persons required to be trained must provide proof of completing the training within the first six (6) weeks of each school year or within the first six (6) weeks of that person's employment. Although the training will be an annual requirement, mandated reporter training must also be completed by school personnel hired during the course of the school year. Therefore, any personnel hired during the school year on or after January 1, 2015, must provide proof of completing mandated reporter training that meets the requirements of AB 1432 within the first six weeks of their employment.

#### What This Means To You

Since the new law is not effective until Jan 1, 2015, the obligation to complete training for existing employees within the first six weeks of the school year will start with the 2015-2016 school year. However, employers who did not provide/require mandated reporting training this school year should consider providing training after January 1, 2015, to ensure employees understand their mandated reporting responsibilities and help reduce employer exposure to potential liability should abuse occur.

All new employees hired after January 1, 2015, will be required to complete mandated reporter training within the first 6 weeks of their employment. If the online training module to be developed by the State Department of Social Services is not available at that time, school employers will need to identify another training source and specify to the State Department of Social Services what training was used.

KMTG conducts live training which meets this new legal obligation. For more information visit KMTG's website at:

<http://www.kmtg.com/resources/training/ab-1432-mandatory-child-abuse-and-neglect-mandated-reporter-training>

#### Questions

If you have any questions concerning the content of this Legal Alert, please contact the following KMTG attorneys, or the attorney with whom you normally consult.

**Michelle L. Cannon, William F. Schuetz or S. Diane Beall | 916-321-4500**

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## SELF Esteem

Congratulations to the five 2015 California Teachers of the Year named by State Superintendent Tom Torlakson in October.

The five are **Maggie Mabery, Manhattan Beach Unified School District**, Amy Laughlin, Savanna School District, Lovelyn Marquez-Prueher, Los Angeles Unified School District, Christopher O'Connor, St. Helena Unified School District and Erin Rosselli, Orange Unified School District.



Marquez-Prueher was nominated by Torlakson as California's representative in the National Teacher of the Year award.

*Active SELF members are indicated by bolded type.*

## Board Changes

The SELF Board of Directors has undergone a number of changes during the past eight months. In April, the Board appointed long-time Area III Alternate Richard Hare to the Area III Representative position left vacant by the retirement of John Falappino. Hare, the Executive Director of Tri County SIG, has been on the SELF Board since 2006. Bev Wilkinson, Executive Director of Schools Insurance Group was appointed to the Area III Alternate position previously held by Hare.

The Board also appointed three new alternates at its June meeting—Kristine Kamandulis, Loss Control Manager at Santa Clara County SIG, was appointed to the Area V

alternate vacancy left by the retirement of Stephen Hosler; Dan Mellon, Director of Risk Management and Human Resources at Chino Valley USD was appointed to an Area VI alternate vacancy; and Susan Harrison, Director, General Services at San Mateo County Community College District was appointed to the Northern Community College alternate vacancy.

Area I Board Representative Norine Tweedie, Ukiah USD, resigned her position on the SELF Board in September, following a move out of state. That position has not yet been filled.

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## SELF Resource Center Best Management Practices

### Top Ten Tips for Managing Volunteers

By Ann H. Franke, Esq.

Perhaps your organization relies on volunteers. Or perhaps you are one of the 83 million Americans who volunteer. Volunteers help worthy groups stretch their resources and volunteers gain the satisfaction of making a difference. Things usually go well, but occasionally volunteers create headaches. Their missteps may result in discrimination or harassment, unsafe conditions, or needless escalation of a delicate situation. In extreme cases, they may commit criminal acts such as theft, privacy violations, or molestation.

When you think about it, managing volunteers is not too different from managing employees. Here are 10 top tips for managing volunteers.

#### 1. Define the functions.

What do you want a volunteer to do? The better you can define the role, in writing, the better the volunteer's experience will be. Establish functions and estimate the necessary time commitment. Occasionally employees volunteer for extra work in their own organizations. Under the Fair Labor Standards Act, they may not volunteer in their own positions. Give them other responsibilities. This prevents employers from circumventing FLSA overtime pay requirements.

#### 2. Set ground rules.

Establish general do's and don'ts for all volunteers. These vary from organization to organization. Rules will be most elaborate for volunteers working with vulnerable groups such as children or clients with mental disabilities. Consider these examples.

- **DO** follow nondiscrimination, harassment, and conflict of interest policies.
- **DO** stay home if ill.

- **DO** know what to do if a client or volunteer is injured or has a medical emergency.
- **DO** know evacuation procedures and other emergency protocols.
- **DO** protect confidential or privileged data disclosed during volunteering.
- **DON'T** drive clients in personal vehicle. (Some groups prohibit all driving.)
- **DON'T** share your address or phone number with clients.
- **DON'T** give gifts or make loans to clients.
- **DON'T** handle cash unless an employee is present.
- **DON'T** commit the organization to purchases or future actions.
- **DON'T** spend time alone with children, for example taking them to the bathroom. Always have two adults present.
- **DON'T** see children outside the volunteer setting, for example no babysitting or overnight stays.

Develop ground rules for volunteers based on your organization's policies.

#### 3. Match volunteers to suitable positions.

Use an application form to determine a volunteer's skills and preferences. What type of position would be most satisfying to them? Application forms also record the volunteer's address and phone number, as well as emergency contact information.

Perform screening appropriate to the volunteer's functions. Criminal background checks may be appropriate or legally required for people working with children. For drivers, you might want to check motor vehicle records and automobile insurance. Some groups decline volunteers seeking to perform community service in lieu of civil or criminal fines or jail time.

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## SELF Resource Center Best Management Practices

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Consider a minimum age for volunteers, such as 15 or 18. Remember to get parental permission for volunteers who are not adults. Whatever your approach, make a good match between the volunteer and the position.

### **4. Provide training to volunteers.**

Organizations often underestimate the amount of training volunteers need. Training helps volunteers function effectively, and it enhances their commitment. Help them understand your workplace policies, emergency protocols, and do's and don'ts. What should volunteers do if they hear rumors? Explain where they can get answers to problems of any type.

### **5. Supervise volunteers.**

Commit adequate resources to running your volunteer effort. The benefits are worth the investment. If supervising volunteers is just "added on" to an employee's duties, the employee may not give the assignment the attention it deserves. The employee may even resent the added responsibilities. Give the job of supervising volunteers to someone with suitable skills. Put it in their job description and reward them for success.

### **6. Support volunteers.**

Support and encouragement are critically important to volunteers, particularly early in the relationship. Solicit their feedback too.

### **7. Give employee supervisors authority over the volunteers.**

Some supervisors may be hesitant to wield authority over volunteers. However make it part of their jobs. Assist them with what to do and how to do it.

### **8. Address problems promptly.**

Immediately address any behavior, conduct, or performance issues with a volunteer. Take corrective action. For personality clashes or other social issues, consider coaching or reassignment. Immediately remove a volunteer who creates safety hazards or violates important policies. Do not tolerate behavior that jeopardizes your program. Document the actions you take on volunteer problems.

### **9. Evaluate volunteers.**

At least annually, sit down with volunteers to discuss how things are going. A good, two-way conversation is helpful to both the volunteer and the organization.

### **10. Make and retain documentation.**

Work with your lawyer on developing waiver and release forms for volunteers to sign. Document the functions volunteers perform, along with their successes and challenges. If you remove a volunteer, record the steps you took and why. Retain volunteer records for a set period of time.

Don't you agree? Managing volunteers is a lot like managing employees.