



# SJVIA

San Joaquin Valley  
Insurance Authority

## BOARD OF DIRECTORS

SUSAN B. ANDERSON

JUDITH CASE

MIKE ENNIS

ALLEN ISHIDA

PHIL LARSON

DEBORAH POOCHIGIAN

PETE VANDER POEL

Meeting Location:  
Fresno County Employee Retirement  
Association Board Chambers  
1111 H Street  
Fresno, CA 93721  
August 24, 2012  
9:00 AM

**AGENDA DATE:** August 24, 2012

**ITEM NUMBER:** 5c

**SUBJECT:** Receive and File Report on SJVIA Marketing Activity

**REQUEST(S):** That the Board receive and file a report of current SJVIA Marketing Activity

**DESCRIPTION:**

As an update to the July 20, 2012 report on marketing activity, this report is intended to provide overview of past, present, and future marketing activities. Gallagher Benefit Services (GBS) at the direction of SJVIA Staff have undertaken several marketing efforts to identify and make contact with prospective member entities to consider joining the JPA. These efforts have consisted of participating in various events and highlighting the benefits of joining the SJVIA. These have included participation at the San Joaquin Valley Regional Association of CA Counties Fall Conference and as an Exhibitor at the California Public Employees Labor Relations Annual Conference.

The SJVIA continues to pursue opportunities with the Central San Joaquin Valley Risk Management Authority (RMA). The RMA, consisting of 55 members of incorporated municipalities from Kern County in the south to Sutter County in the North, established an AdHoc Committee to evaluate SJVIA Membership. The Committee met on April 17, 2012 and Gallagher and SJVIA staff provided a presentation to the Committee with follow up questions and answers. This was the second presentation to the RMA that followed a presentation to their

**AGENDA:** San Joaquin Valley Insurance Authority

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Executive Committee in February of this year. SJVIA information has been distributed to all 55 of their member Cities asking those with interest to follow up directly with the SJVIA. At the present time, 32 of those member cities have responded with information requested to develop SJVIA rates and are at various stages in the underwriting process.

Although the RMA has not made a decision to add the SJVIA benefit program to their membership requirements or made a formal endorsement, they have encouraged members to explore the SJVIA option independently.

Additional direct marketing efforts have been under way to prospective members who are not affiliated with the RMA. These include several larger cities, counties, and special districts. For many prospective CalPERS entities, this is the first time they have begun to exploring any alternatives since moving. These discussions, while not immediately resulting in SJVIA membership, are positive steps toward movement in future years. Gallagher will continue to foster these longer term growth opportunities as the SJVIA matures and continues to experience positive growth with stable costs.

Further, Gallagher is hosting a Healthcare Reform Seminar at their Fresno office and has invited several contacts at current and prospective SJVIA member entities.

**FISCAL IMPACT/FINANCING:**

None

**ADMINISTRATIVE SIGN-OFF:**



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Paul Nerland  
SJVIA Manager



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Jeffrey Cardell  
Assistant SJVIA Manager

**BEFORE THE BOARD OF DIRECTORS  
SAN JOAQUIN VALLEY INSURANCE  
AUTHORITY**

**IN THE MATTER OF** Receive and File Report on SJVIA Marketing Activity

**RESOLUTION NO.** \_\_\_\_\_  
**AGREEMENT NO.** \_\_\_\_\_

UPON MOTION OF DIRECTOR \_\_\_\_\_, SECONDED BY  
DIRECTOR \_\_\_\_\_, THE FOLLOWING WAS ADOPTED BY  
THE BOARD OF DIRECTORS, AT AN OFFICIAL MEETING HELD \_\_\_\_\_  
\_\_\_\_\_, BY THE FOLLOWING VOTE:

AYES:  
NOES:  
ABSTAIN:  
ABSENT:

ATTEST:

BY: \_\_\_\_\_

\* \* \* \* \*

That the Board received and filed a report of current SJVIA Marketing Activity

**SJVIA Prospective Member Listing**  
**Updated as of 8/13/2012**

|    | Entity Name                | Entity Type      | Meeting Set | 2nd Email | 3rd email | Received Census info as of August 8, 2012 | Renewal:  | Active EE's | Pre-65 Ret | Post-65 Ret | Cal Pers: |    | Proposal Sent |        |      |
|----|----------------------------|------------------|-------------|-----------|-----------|---|-----------|-------------|------------|-------------|-----------|----|---------------|--------|------|
|    |                            |                  |             |           |           |   |           |             |            |             | Yes       | No | Direct        | Broker | Both |
| 1  | Arvin                      | City             |             | Yes       |           | No response                               | January   | 45          | 0          | 0           |           | x  | x             |        |      |
| 2  | Avenal                     | City             |             |           | Yes       | Sent information                          | October   | 47          | 0          | 2           |           | x  |               |        | x    |
| 3  | Calaveras                  | County           | Yes         |           |           | Targeting 2014                            | January   |             |            |             |           | x  |               |        |      |
| 4  | Ceres                      | City             | Yes         |           |           | Sent information                          | January   | 115         | 0          | 0           |           | x  |               |        | x    |
| 5  | Chowchilla                 | City             |             |           |           | asked questions, is gathering info.       | June      | 44          | 0          | 0           |           | x  | x             |        |      |
| 6  | Clovis                     | City             | Yes         |           |           | Sent information                          | January   | 384         | 10         | 6           |           | x  |               |        | x    |
| 7  | Corcoran                   | City             | Yes         |           |           | Sent information                          | July      | 60          | 0          | 0           |           | x  | x             |        |      |
| 8  | Delano                     | City             | Yes         |           |           | Sent information                          | July      | 197         | 16         | 0           |           | x  |               |        | x    |
| 9  | Dinuba                     | City             |             |           |           | Sent information                          | July      | 122         | 10         | 0           |           | x  |               |        |      |
| 10 | Dos Palos                  | City             |             |           |           | Sent information                          | August    | 17          | 0          | 0           |           | x  | x             |        |      |
| 11 | Escalon                    | City             |             |           | Yes       | Sent information                          | Jan       | 23          | 0          | 0           |           | x  | x             |        |      |
| 12 | Exeter                     | City             |             |           |           | Sent information                          | February  | 38          | 0          | 0           |           | x  | x             |        |      |
| 13 | Firebaugh                  | City             |             |           | Yes       | Sent information                          | January   | 37          |            |             |           |    |               |        |      |
| 14 | Fowler                     | City             | Yes         |           |           | Sent information                          | September | 20          | 0          | 0           |           | x  | x             |        |      |
| 15 | Gustine                    | City             |             |           |           | asked questions, is gathering info.       | January   | 17          | 0          | 0           |           | x  | x             |        |      |
| 16 | Huron                      | City             |             |           |           | No response/ Do Not pursue                | July      | 15          | 0          | 0           |           | x  |               |        | x    |
| 17 | Kerman                     | City             |             | Yes       |           | No response                               | July      | 53          | 0          | 0           |           | x  | x             |        |      |
| 18 | Kings                      | County           | Yes         |           |           | Targeting 2014                            | July      | 1000        | 70         |             |           |    |               |        | x    |
| 19 | Kingsburg                  | City             |             | Yes       | Yes       | Sent information                          | Feb       | 45          | 0          | 0           |           | x  | x             |        |      |
| 20 | Lathrop                    | City             |             | Yes       |           | Sent information                          | January   | 78          | 5          | 10          | x         |    | x             |        |      |
| 21 | Madera                     | City             |             |           |           | asked questions, is gathering info.       | July      | 246         | 15         | 0           |           | x  | x             |        |      |
| 22 | Madera                     | County           | Yes         |           |           | Targeting 2014                            | January   | 1123        |            |             | x         |    | x             |        |      |
| 23 | Mendota                    | City             | Yes         | Yes       |           | Sent information                          | May       | 28          | 0          | 0           |           | x  | x             |        |      |
| 24 | Nevada Irrigation District | Special District | Yes         |           |           | Targeting 2014                            | January   | 120         | 70         |             | x         |    | x             |        |      |
| 25 | Newman                     | City             |             | Yes       | Yes       | No response                               | January   | 29          | 0          | 0           |           | x  |               |        | x    |
| 26 | Orange Cove                | City             |             | Yes       |           | Sent information                          | July      | 37          | 0          | 0           |           | x  | x             |        |      |
| 27 | Reedley                    | City             | Yes         |           |           | No response                               | January   | 115         | 10         | 21          |           | x  | x             |        |      |
| 28 | Ripon                      | City             |             | Yes       |           | No response                               | January   | 88          |            | 3           |           | x  | x             |        |      |
| 29 | Riverbank                  | City             | Yes         |           |           | Sent information                          | July      | 45          | 0          | 0           |           | x  | x             |        |      |
| 30 | Santa Cruz                 | County           | Yes         |           |           | Targeting 2014                            | January   | 2087        | 315        | 897         | x         |    | x             |        |      |
| 31 | Shafter                    | City             |             |           |           | Sent information                          | July      | 60          | 0          | 2           |           | x  | x             |        |      |

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|    |             |             |             |           |           |   |          |             |            |             | Yes       | No | Direct        | Broker | Both |
| 32 | Sonora      | City        |             | Yes       |           | No response                               | June     | 35          | 5          | 0           |           | x  | x             |        |      |
| 33 | Stanislaus  | County      |             |           |           | Targeting 2014                            | January  | 3982        | 1200       |             |           | x  |               |        |      |
| 34 | Tehachapi   | City        |             | Yes       | Yes       | No response                               | January  | 50          | 0          | 0           |           | x  | x             |        |      |
| 35 | Tulare      | City        | Yes         |           |           | Joined SJVIA                              | July     | 334         | 24         | 41          |           | x  | x             |        |      |
| 36 | Wasco       | City        |             | Yes       | Yes       | No response                               | January  | 54          | 0          | 0           |           | x  | x             |        |      |
| 37 | Waterford   | City        |             |           |           | Sent information                          | June     | 12          | 0          | 0           |           | x  | x             |        |      |
| 38 | Woodlake    | City        |             | Yes       |           | No response                               | December | 28          | 3          | 0           | x         |    | x             |        |      |