

EXHIBIT B – SCOPE OF WORK

Representatives from Alliant Insurance Services, Inc will work with the City of Carmel By The Sea stakeholders to ensure that services delivered by the Alliant team are structured to help the City achieve your desired risk management goals and objectives. This will involve the following scope of work:

Year 1 Objectives

1. Assess current safety program gaps
2. Development of initial prioritized safety program templates
3. Supervisor Training

Safety Program Assessment (est. 16 hours):

Alliant will conduct an operational assessment in the following areas to identify safety program compliance gaps and gain an understanding of operational exposures based on work performed for the City. Operations we anticipate to include in our initial assessment include Public Works, Public Safety and General Services. Others may be included as required. The assessment typically involves the following activities.

- Stakeholder and employee interviews
- Documentation review to include safety programs, work orders, and other information as appropriate
- Loss reviews and analysis
- Equipment availability and assessment
- Vendor reports if available and necessary
- Physical observation of selected work practices or services performed

Alliant will use the information obtained during our assessment to work with City stakeholders and develop an executive level report outlining findings and recommended actions.

Prioritized Safety Program Templates (est. 60 hours):

Based on operational assessment, Alliant will work with the City stakeholders to identify and prioritize written safety compliance program gaps. Based on priority, Alliant will create up to 4 safety program templates. Templates will include the required components for regulatory compliance, however, the city to need to modify with specifics that may include contact information, workflows, and procedures.

Based on preliminary discussions, it appears that the City will need to develop or enhance several compliance programs. Initial anticipated priority programs may include:

- Injury & Illness Prevention Program (provided at no charge)
- Emergency Action

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- Hazard Communication Program
- Bloodborne Pathogens
- Fall Protection
- Lockout Tagout and Energy Control
- Confined Space
- Others as determined necessary during the program assessment

Supervisor Training (est. 6 hours):

Based on operational assessment and status of current safety training programs, Alliant will provide 1 day of Supervisor focused in-person training that will include 1.5 hour sessions on the following topics:

- Fundamentals of Hazard Assessment
- Accident Investigation Basics
- Job Hazard Assessment (JHA) Essentials

Year 2 Objectives:

1. Continued development of safety program templates
2. Development of department safety training matrix
3. Development of department specific safety inspection forms

Continuation of Prioritized Safety Program Templates (est. 55 hours):

Alliant will work with the City stakeholders to identify and prioritize written safety compliance program gaps. Based on priority, Alliant will create up to 4 additional safety program templates. Templates will include the required components for regulatory compliance, however, the city to need to modify with specifics that may include contact information, workflows, and procedures.

Department Safety Training Matrix (est. 10 hours):

Alliant will work with City stakeholders to create safety training matrix for 1 department. Matrix will include safety training and frequency required for each job title within departments.

Department-specific Safety Inspection Forms (est. 10 hours):

Alliant will work with City stakeholders to develop department-specific safety inspection forms for up to 2 departments.

Out of Scope

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Program customization, implementation and training (other than proposed Supervisor training) are not included in the current Scope of Work. Separate pricing will be developed if the City intends to use Alliant Risk Control for all or part of program implementation.

Proposed Fee

Year 1:	Not to exceed \$15,000. Monthly invoice for services rendered will reflect billable hours for the previous month's services. <u>Hourly Rate:</u> \$180 per hour and is inclusive of all anticipated expenses except for overnight travel and expense. Overnight travel is anticipated to be 3 nights. Overnight expenses will be billed directly at reasonably incurred expenses for lodging and meals. There will be no administrative fees.
Year 2:	Not to exceed \$15,000. Monthly invoice for services rendered will reflect billable hours for the previous month's services. <u>Hourly Rate:</u> \$200 per hour and is inclusive of all anticipated expenses except for overnight travel and expense. Overnight travel is not anticipated.
Billable Services	Billable time includes: Travel as described above, preparation for conference calls and meetings, on-site visits, program review, enhancement and/or development, research and report writing. Travel will be invoiced at 50% of hourly rate. Mileage will not be charged.
Non-Billable Services	General email correspondence, informational and technical request and/or related calls will not incur a charge. Service request may be billed for time required to provide deliverable or service requires greater than (.5) hour effort. Alliant scheduled and archived webinars that are not specific to CITY OF CARMEL BY THE SEA plan are offered free of charge (approximately 10+ per year).

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Consulting Team

The Alliant Risk Control Practice is a National practice serving Alliant Insurance Service clients throughout the Continental United States. John Owen will be the project lead and will be supported by the team of professionals listed below. As leader, John will be directly involved in the assessment, development and delivery of services outlined. Brief bios for each of the team members are listed below.

Tim Leech, CSP, ARM

Director – Risk Control Consulting

Tim has over 30 years of experience in a multitude of industries to include public entity, healthcare, academia, manufacturing, warehouse distribution and logistics industries. His primary focus is working with large risk management clients to reduce cost via pre-loss mitigation solutions as well as state and federal OSHA and best practice gap analysis. Tim is located in the Newport Beach, CA office where he manages a National team of consultants. As a “player-coach”, Tim keeps his finger on the pulse of client and industry trends to ensure the highest level of performance by his staff. Tim has worked at Alliant for 9 years.

John Owen, CSP, CIH

Lead Risk Control Consultant

John is a Lead Risk Control Consultant for Alliant Insurance – Risk Control Services team where he brings his passion as a safety professional, enthusiasm for collaborative partnerships, and over 20 years of experience including roles in safety consulting, operations, and account management. John’s unique background has enabled him to combine safety/risk control consultation along with practical experience of the daily aspects of business operations. While John is a generalist, he has significant experience in public entity, high-tech, higher education, and general industry.

Kristi Loiselle, CEAS

Risk Control Consultant

Kristi has over 10 years of experience and held various positions in the risk control practice with Alliant Insurance Services. Kristi’s specialties include property protection, fleet safety and ergonomics. She also frequently works with clients to enhance regulatory compliance with OSHA related written program standards. Kristi has been with Alliant for approximately 10 years.

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Raymundo Machado, CEAS

Associate Risk Control Consultant

Ray is the newest member of the risk consulting team and a recent graduate from California State University Northridge with a Bachelor of Science in Occupational Health. His primary responsibilities include conducting data analytics as well as analyzing safety programs and offering guidance to help enhance and achieve greater compliance with Federal and State OSHA regulations. Ray has been involved in projects to include conducting facility inspections and ergonomic assessments. He also works closely with clients to analyze, enhance and implement safety programs. Professional development includes Confined Space, Ergonomics and Cal OSHA – General Industry 30 Hour certifications.