

# *The Californian*

## *The Quarterly Newsletter of*



*May 2022*

915 L St. #C251

Sacramento CA 95814

916.930.0552

[www.calsaga.org](http://www.calsaga.org)



*Included  
in this  
edition:*

**3 - PRESIDENT'S MESSAGE**

**4 - REGULATION CORNER**

**5 - WORKERS COMPENSATION AUDITS – BE  
PREPARED!**

**6 - PREPARING FOR YOUR BSIS RECORDS AUDIT**

**7 - SPRING CLEANING: THERE'S NO BETTER TIME  
FOR YOUR NEXT HR AUDIT**

**8 - 3 STEPS TO COST-EFFECTIVELY STREAMLINE  
YOUR SECURITY GUARD MANAGEMENT PROCESS**

**9 - POSITIONING YOURSELF AS AN EMPLOYER OF  
CHOICE**

**10 - THE IMPORTANCE OF DE-ESCALATION  
TRAINING IN A POST-LOCKDOWN WORLD**

**12 - NETWORK PARTNER SHOWCASE**

**13 - ADDING VALUE TO YOUR BIDS AND PROPOSALS**



**Legal | Human Resources | Sales and Profitability | Insurance  
BSIS and OSHA Compliance**

**May 10th - 11th 8:00am- 4:30pm  
Sacramento, CA**

Sponsored by:

**TRACK** 



# 2021-2022 BOARD OF DIRECTORS

## PRESIDENT

David Chandler

## VICE PRESIDENT

Gary Bradley

## VICE PRESIDENT

Aleda Sebenick

## SECRETARY

Mike Smidt

## TREASURER

Mark Miller

## NORTHERN CALIFORNIA DIRECTOR

Ashlee Cervantes

## NORTHERN CALIFORNIA DIRECTOR

Nils Welin

## SOUTHERN CALIFORNIA DIRECTOR

Manuel Jimenez

## SOUTHERN CALIFORNIA DIRECTOR

Hugo Rodriguez

## DIRECTOR AT LARGE

Brett Guest

## DIRECTOR AT LARGE

Conrad Levoit III

## LEGAL ADVISOR

Barry Bradley and  
Jaimee Wellerstein

## STAFF

**ASSOCIATION MANAGER** Kate  
Wallace

## PROGRAM MANAGER

Kris Smidt **COMMUNICATIONS  
MANAGER**

Aley Moyer **ADMINISTRATION**  
Andrea Chandler



## PRESIDENT'S REPORT

David Chandler, CALSAGA President

**T**hank you for reading this edition of *The Californian*. We have a lot of great information for you. Three different authors focused on audits: Worker's Compensation, BSIS and Human Resources. Help us help you; don't miss any of the articles included in this edition! **On page 6** our Legal Advisor Barry Bradley addresses many areas of concern when preparing for an audit by the Bureau of Security & Investigative Services. My presentations during next week's Security University session in Sacramento will be a good compliment to Barry's article and will dive into how to protect your business by being in compliance. Next week's management training program Security University will be our second of the year. I and our staff have been very glad to gather with you again in person. At the time of this writing there are less than 10 tickets remaining for Security University. Register now.

Registration will be opening soon for the 2022 CALSAGA Annual Conference. The conference will take place October 18th - 20th at the Agua Caliente Resort & Spa. The agenda includes even more opportunities for networking than in years past. I look forward to seeing you then.

Be Safe,



(From left) CALSAGA President David Chandler, Assemblymember Chris Holden, CALSAGA Treasurer Mark Miller

# VIRTUAL Coffee Chat

Hosted by the CALSAGA  
Ambassador Committee

**Tuesday, June 14th  
10:00am | RSVP Required**

**Perception is Reality:  
How to Build and  
Maintain a Positive  
Image of Private  
Security in 2022**



## REGULATION CORNER

David Chandler, CALSAGA President

If you have been reading our updates you know that myself, other association leadership and our lobbyist Kelly Jensen have invested an abundance of time on AB 229. We have worked with Assemblymember Holden's office, testified before Senate committees and have been relentless in making sure that lawmakers understand the interests and dynamics of our industry.

I appreciate those of you who joined us for Coffee Chat: Changes to Training & Regulation that You Need to Know in April where we dove into the implications of AB 229 for our industry. If you missed the Coffee Chat event, make sure to watch the replay. Some changes brought on by the passing of AB 229 will go into effect on January 1, 2023 but some have already taken effect this past January. Make sure that you know what is new and what you are responsible for.

If you would like to make a contribution to the CALSAGA Political Action Fund (PAC), please contact CALSAGA Association Manager Kate Wallace at [kate@calsaga.org](mailto:kate@calsaga.org).

Coverage for the Security Services industry

## THE GUARDIAN

Philadelphia Insurance Companies specializes in the Security Services industry. We understand how to provide a flexible and comprehensive insurance program for risks all across the United States. Coverage is provided on an admitted basis in most states. PHLY's program offers coverages for: General Liability, Property, Automobile, and Crime and Fidelity.

To learn more, please contact our local  
Marketing Representative: **Tim Johns**  
[Timothy.johns@phly.com](mailto:Timothy.johns@phly.com) or **916.724.2297**



**PHILADELPHIA**  
INSURANCE COMPANIES

A Member of the Tokio Marine Group



# WORKERS COMPENSATION AUDITS – BE PREPARED!

Shaun Kelly, Tolman & Wiker,  
CALSAGA Preferred Broker



Hope everyone is doing well and getting out to enjoy more activities outdoors!

Over the past 6 to 12 months, we have been receiving more calls from employers (PPOs) than ever before regarding Workers Compensation Audits. Their concern is that some auditors are requesting more information than they have in previous years. The reasoning behind the auditor's request for additional information is the result of Assembly Bill 5 (AB-5). This is the radical change in the definition of Independent Contractor status in California. And, as a result, Workers Compensation auditors are requesting additional information to obtain verification that employers are classifying their workers correctly and collecting the appropriate premiums.

AB-5 implemented the ABC Test and put the responsibility on the employers to determine the status of their workers. In order to hire and classify a worker as an independent contractor, the employer must demonstrate that all 3 of the independent contractor requirements are satisfied. These 3

requirements include the following:

1. The worker is free from control and direction in the performance of services; and
2. The worker is performing work outside of the usual course of the business of the hiring company; and
3. The worker is customarily engaged in an independently established trade, occupation, or business.

**Even before the implementation of AB-5, a Guard carded security worker is not allowed to work as an independent contractor.**

Workers Compensation auditors are now requesting financials in conjunction with the usual 941 quarterly payroll reports and other documents to determine if payments have been made to independent contractors. Per the terms and conditions of the Workers Compensation policy, audits are mandatory and in Part 5 G-Audits; auditors are able to request the following: "You (policyholder) will let us examine and audit your records that relate to this policy. These records include ledgers, journals, registers, vouchers, contracts, tax reports, payroll and disbursement records, and programs for storing and retrieving data. We may conduct the audits during business regular business hours during the policy period and within three years after the policy period ends. Information developed by audit will be used to determine final premium. Insurance rate service organizations have the same rights we have under this provision."

Since AB-5 was signed into law in 2019, Workers Compensation policies expiring in 2021 and going forward are being affected by the new legislation.

**[CLICK HERE TO CONTINUE READING](#)**

## PREPARING FOR YOUR BSIS RECORDS AUDIT

Barry Bradley, Esq.,  
Bradley, Gmelich + Wellerstein LLP,  
CALSAGA Legal Advisor



So, you received a letter from the Bureau of Security and Investigative Services advising that they will be conducting “a routine inspection” of your documents. It should take no more than two hours (on the average) and the meeting should include the owner(s), executive principals and/or possibly administrative staff “to assess and discuss key aspects of your daily operations” as a PPO.

ALARMS should be going off for you! There is nothing routine about this. Compliance audits are increasing and you should expect one this year. In every instance where our clients have contacted us, they have been out of compliance – some just a little, others a lot. This, despite their best intentions.

The opportunity to fix your records before you are audited could mean the difference between no citation at all, versus an administrative fine, a cease and desist order, and potential suspension or revocation of your PPO license. This all becomes very public, too. Make no mistake about it: BSIS is here to regulate, not to collaborate.

### Areas Of Concern

As a PPO licensee, you have obligations that will require you to address various areas. What follows are some of the broad categories that will be inspected.



### PPO Records, Vehicles and Uniforms:

- Are your PPO license and all branch licenses properly displayed.
- Are your records kept at your principle place of business – as recorded with the Bureau?
- Are your current badges and patches in conformity with the original BSIS approval?
- Are your current badges, patches and insignias in compliance with the Private Security Services Act?
- Are your Certificates of Insurance for both workers compensation and for General Liability in compliance with Business & Professions Code 7583.39 as well as the California Code of Regulations?
- Do your advertisements display your PPO number? This might include websites, social media, vehicles, business cards and brochures.
- Is your business structure in compliance with statutes?
- Do your business records match the Secretary of State records, as well as BSIS records?
- Are your patrol vehicles in compliance with the Vehicle Code and the B&P Code regarding their light bars and decals?
- Are your uniforms in compliance with Business & Professions Code section 7582.26?

### Employee Records:

- Do you maintain the name, address, commencing date of employment, position, and date of termination of each employee in compliance with the Code?
- Do you maintain current guard card and firearm qualification permit information?
- Personnel Files: do they contain guard card information, training, and required certifications? (This may include pepper spray and baton permits, as well.)
- Do you have proper credentials for your off-duty Peace Officers, including a letter from their agency?

**CLICK HERE TO CONTINUE READING 6**

# SPRING CLEANING: THERE'S NO BETTER TIME FOR YOUR NEXT HR AUDIT

Anne Laguzza, The Works Consulting  
CALSAGA Network Partner



As a California business owner, you may have jumped for joy at the start of the year when you realized there were significantly fewer changes to employment legislation than in previous years. If you're with the majority, you probably did a quick update to your policies and procedures, and then filed them away until next year.

Just as I did with my clients, I'd like to encourage you to use this unusual gift to your advantage. It's time for a bit of spring cleaning! Remember, legal compliance is only one part of your human resources practice. Fewer new laws means more breathing room for California employers and, therefore, the ability to more clearly look at the other aspects of your business that may need to undergo some optimization.

**That's where an HR audit comes in to play.** The security industry—like many other industries today—is grappling with maintaining a strong and consistent workforce. As such, there is absolutely no better time to conduct a comprehensive HR audit to bolster your competitive advantage while doing a bit of risk mitigation that will help you down the road. With new jobs popping up regularly, your human resources

practices are operating at a rapid pace that may result in errors and, potentially, legal consequences. It's important to take the opportunity now to make sure that you're set up to do the right thing, every time.

If you've never conducted this kind of audit, or it's been awhile since you last did, here's my guide to making sure it helps your business for years to come.

## What is an HR Audit?

Let's start with the basics—an HR audit takes a formal inventory of your company's practices from hiring to termination of employment. This includes reviewing and optimizing any outdated or ineffective processes, procedures or company policies. The intent of an HR audit is not necessarily to determine what you are doing wrong, but instead, to understand what is going well and could be even better.

**CLICK HERE TO CONTINUE READING**



**TOLMAN | WIKER**

An AssuredPartners Agency

**PREFERRED BROKER OF**



**SHAUN KELLY**

Sr. VP, Risk Advisor

SKELLY@TOLMANANDWIKER.COM  
(661) 616-4712

- Workers' Compensation
- General Liability/ Errors and Omissions
- Commercial Property
- Employment Practices Liability
- Crime
- Commercial Auto
- Excess Liability
- Cyber Liability

**For a FREE consultation, call  
or email me today!**

Power Through Partnership



# 3 STEPS TO COST-EFFECTIVELY STREAMLINE YOUR SECURITY GUARD MANAGEMENT PROCESS

Tony Unfried, CSA 360



Are you looking to improve your security guard management processes? Adding a security management software system is key. With all the options out there, finding a budget-friendly system that effectively manages your team can feel like a daunting task. But there is an option that can easily meet both goals. A customizable security guard software system is a game changer for security teams of all sizes.

The benefits of implementing a customizable security guard management system are vast. But most importantly, it puts the control in your hands. A customizable system means:

You can pick and choose which modules you need most. Many security guard management systems require you to buy every tool and feature, which significantly drives up costs. But a customizable system means you can choose which tools, features, and modules are best for your team.

A custom system is budget-friendly. A customizable security software system means you only pay for the modules you want. This makes it much simpler to stay within your budget.

You can plan for future growth. A customizable system allows your team to grow with the software. The modules you decide are



- ◆ Qualified Manager Training
- ◆ BSIS Audit Assistance
- ◆ Overall Compliance with BSIS Regulations
- ◆ Firearm Training and Qualification Assistance (TTF 1143)

**Call David Chandler to set up a free consultation: (760) 408-5634**

unnecessary today may change in the future. Simply add more modules and tools as your needs change.

Ready to see how security guard management software can modernize your security management processes?

Here are 3 Steps to Cost-Effectively Streamline Your Security Management System

## **Step 1. Decide Which Software Features Are Most Important for Your Security Team**

Your security guards need modern, innovative, and user-friendly tools available to help them do their best work. A security software system is the ideal way to do this. Not only does security software reduce challenges for security teams, but the modules and features also improve processes at an affordable cost.

**CLICK HERE TO CONTINUE READING** 8



# POSITIONING YOURSELF AS AN EMPLOYER OF CHOICE

Jeff Davis,  
TEAM Software, Network Partner



It comes as no surprise that hiring (and retention) is still a hot topic in the security industry. While there's no magic answer to overcoming the challenges of today's competitive market, we know the key to attracting talent is to position yourself as an employer of choice. There are the obvious variables you should consider when making your open positions competitive (like wages and benefits, for example). The other part of that strategy is making sure the right applicants know who you are, or how to find out more about you.

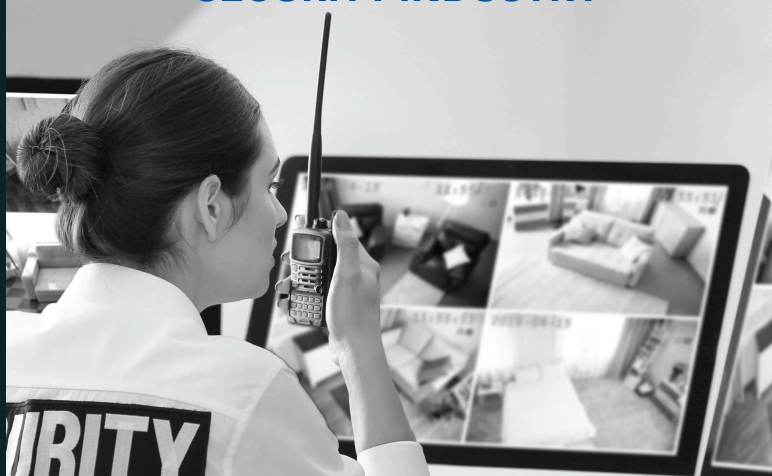
That's easier said than done. You can post an opening to a job board and post about it on your website or social media, but that's only the first step in becoming more visible. You need to make sure that job seekers can find you, they can understand your website, and the information you're presenting is clear. To achieve those things, you need to start thinking like a marketer. Start by comparing a traditional recruitment funnel against a traditional marketing funnel. They really aren't all that different, especially in the beginning stages. Awareness is at the top of each process and where you have the most opportunity to

position yourself as an employer of choice. This is your first touch point with potential job candidates and the stage where you can set the framework for the quantity and quality of your candidate leads. To improve awareness, think about:

- Improving your SEO. To those outside the marketing field, SEO may sound daunting, but it's a readily available tool you can draw on to make your company — and website — more "findable" by job seekers. Using what you can find from SEO, you can add keywords to job descriptions, organic and paid ads, blog posts and webpages to help increase visibility where you need it.

[CLICK HERE TO CONTINUE READING](#)

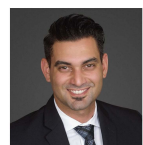
## INSURANCE & RISK MANAGEMENT SOLUTIONS FOR THE PRIVATE SECURITY INDUSTRY



Workers' Compensation | General Liability | Errors & Omissions | Crime  
Commercial Auto | Employment Practices | Property | Surety Bonds



Nick Langer  
Senior Risk Advisor  
nlanger@tsibinc.com  
(661) 645-4947



Mike Langer  
Risk Advisor  
mlanger@tsibinc.com  
(661) 403-0117



**NETWORK  
PARTNER**

**TSiB®**

# THE IMPORTANCE OF DE-ESCALATION TRAINING IN A POST-LOCKDOWN WORLD

Tory Brownyard, Brownyard Group



In early April, three women physically attacked a security officer at a Macy's in Palo Alto, California. When asked to return stolen goods the women punched the officer in the face and the head and assaulted him with pepper spray. Similar situations have become all too common for security professionals, particularly as people struggle to adapt to a new hybrid environment after two years of lockdowns, heightened stress and increased economic pressures. With this spike in aggressive behavior, security firms are faced with new challenges and risks involving the safety of their employees and the success of their business.

## The Risks

Security professionals face risks every day. In hospitals, restaurants, airports, office parks and shopping malls, a normally calm situation can quickly escalate. When rising tensions and aggressive behavior are added into the equation, the risk to security firms and their employees can increase significantly. These risks can include:

- **Employee Safety:** Over the past two years security professionals were asked to take on new and added responsibilities, including asking for the vaccination status of members of the public attempting to enter certain facilities, enforcing mask mandates and limiting access to various venues or facilities. In some of these situations, members of the public directed their frustrations at security personnel tasked with ensuring their safety and the safety of others. In more than a few instances, these situations turned violent.

**CLICK HERE TO CONTINUE READING**

## The Company

EXECUTIVE AND DIGNITARY PROTECTION SPECIALISTS



**DAVID CHANDLER**  
President / CEO  
david@thecompany.global

Los Angeles: 310-273-3500  
Las Vegas: 702-302-4875  
Reno: 775-335-0091  
Washington DC: 571-969-4106

## Discover What You've Been Missing



### Having trouble finding profitability and growth?

Uncover hidden data and solve challenges around hiring and retention, customer satisfaction, guard scheduling, and more — all with one full-circle technology partner.

 **TEAM Software**  
by WORKWAVE

[teamsoftware.com/californian](https://teamsoftware.com/californian)



Our unique program is available at an  
additional discount to CALSAGA members



## Planning For 2022?

### BG+W Business & Employment Counsel Program™

Our BG+W Business & Employment Counsel Program™ is a monthly subscription program that provides the essential business, employment and regulatory documents you need to run your business in California, customized for your company, plus access to experienced legal counsel.

### Our Program Includes...

- Access to Experienced legal counsel
- Extensive knowledge of the security industry in CA
- Custom solutions for your company
- Predictability for your legal budget
- An extraordinary value...

**OVER \$10,000 IN POTENTIAL SAVINGS  
IN JUST THE FIRST YEAR!**

### Contact Us Today!

Contact your CALSAGA Legal Advisors  
at Bradley, Gmelich & Wellerstein LLP:

**Barry A. Bradley** – [bbradley@bgwlawyers.com](mailto:bbradley@bgwlawyers.com)

**Jaimee K. Wellerstein** – [jwellerstein@bgwlawyers.com](mailto:jwellerstein@bgwlawyers.com)

[bgwlawyers.com](http://bgwlawyers.com)

### TRACKTİK

### Mitigate Risk of Non-compliant Breaks with TrackTik's Enhanced Break Management

With the latest enhancements to TrackTik's Break Management, you can view break times that are precise and to the second. You can also record interrupted breaks, eliminate the need for paper waivers, obtain detailed analytics, and optimize your resources. In return, you can mitigate legal risk, all while protecting the rights of your employees.



Find out more at [www.tracktik.com](http://www.tracktik.com)

### THE MECHANIC GROUP OFFERS BEST-IN-CLASS WORKERS COMPENSATION AND EMPLOYERS LIABILITY COVERAGE

Security Guard and Investigative Class Codes

Competitive Rates

Guaranteed Cost and Large Deductible Programs Available

Payroll reporting payment options available as well as direct bill monthly installments

Loss Control and Risk Management on larger accounts



**CALSAGA  
NETWORK PARTNER**



### WE ALSO OFFER THESE BEST-IN-CLASS COVERAGES

Commercial Liability including Errors and Omissions

Commercial Auto

Privacy and Network Liability

Umbrella

Fidelity and Third Party Employee Dishonesty

Employment Related Practices

### ASK YOUR BROKER TO CONTACT US

Marc Katz, Principal

800.214.0207, EXT. 105

[mkatz@mechanicgroup.com](mailto:mkatz@mechanicgroup.com)

Mechanic Group, a division of Specialty Program, LLC. Doing business in California as SPG Insurance Solutions License No. 0L09546.



# Thank you to our CALSAGA Network Partners!



Bradley  
Gmelich+  
Wellerstein LLP



Silvertrac



TRACK TIK

TSiB

CLICK HERE TO LEARN MORE  
ABOUT NETWORK  
PARTNERSHIPS.



Contribute to the  
CALSAGA Charitable  
Foundation and help  
us help security  
professionals in need.

Watch the Replay

Coffee Chat

Hosted by the CALSAGA  
Ambassador Committee

Changes to  
Training and  
Regulation that  
You Need to  
Know



# ADDING VALUE TO YOUR BIDS AND PROPOSALS

Debbie Trecek Volkens,  
TEAM Software, Network Partner



Lowest bid technically acceptable is a painful part of the industry we work in. It's why, sometimes, strategic initiatives to become more efficient fall to the back burner: initial investments in time and resources can seem like an unnecessary burden when you're struggling to fill shifts and keep operating expenses within budget.

The catch twenty-two about a back-burner approach, though, is that you cannot lower your costs and grow your profit without taking that first step towards efficiency. One tactic you can use to kickstart the process is to look at your business proposals and highlight where an efficiency-driving solution can bring direct value to your clients. Look at [these five key areas](#) of need your prospective clients are asking for and add information to your bids to strengthen your proposals.

## Qualified Guards On Site

Your clients are ensuring guards with the right qualifications are filling the needs of their contracts in order to create the safest and most secure environment possible. Demonstrate how you record and track certifications of officers, and send notifications when certifications are due to be updated.

## Reduced Liability And Risk

Incidents and risk open your clients up to liability and lawsuits. Demonstrate how you

help shoulder that responsibility of welfare by monitoring where and when an officer is onsite (and how you have evidence via location tracking technology, checkpoint documentation or rich media like photos and video to back up your claims). Be prepared to offer daily shift reports to provide visibility and quality assurance, and showcase your safety procedures and automated communication flows so you can keep your clients aware of an unfolding incident and resolution status.

## Communication, Response Times And Customer Service

If there is an incident on site, your client needs it to be resolved appropriately and quickly. You should be able to send quick messages (like texts, emails or phone calls) securely to individual officers, or to larger patrol teams. Emergency communication automations can be leveraged to support your resolution practices and bring examples of reporting materials (like activity logs, incident reports and inspections).

**CLICK TO CONTINUE READING**

Security Training Experts



760-773-5555

Monday - Friday 9AM-4PM

TFF 1143 | TIF 1770

77682 Country Club Dr, Suite  
A-2 Palm Desert, CA 92211

Guard Card Classes | Firearms Training  
Baton Training | Taser Training |  
Chemical Agent | CCW Classes (Riverside County)