

Bob Blum – Mediation

Bob@BobBlumMediation.com

415-815-8633

Mediation

For over 40 years I have worked with multiple stakeholders in large public and private organizations who have conflicting needs to help them develop practical legal and business solutions to resolve complex problems concerning employee compensation and benefits.

My work has involved advice, claims and litigated disputes in many areas that involve employees, employers and the money that pays for benefits. This includes issues of pensions, health benefits, disability benefits, employment discrimination, collective bargaining agreements, employee relations, contracts, finances and financial institutions, and trust and fiduciary issues. I have been Deputy General Counsel of a 40,000 employee company, partner in national and regional law firms, senior HR consultant in a national firm and Legislation Counsel for the Joint Tax Committee, U.S. Congress.

This experience has given me insight into how to help parties reach practical and workable resolution of complex issues. I have recently established a separate mediation practice. I have trained as a mediator with Pepperdine University's Straus Institute for Dispute Resolution ("Mediating the Litigated Case" – 42 hours of training). I am a member of the mediation panel for the U.S. District Court, Eastern District, California.

Law Practice and Consulting

2013-present, Deputy General Counsel, Benefits, The Permanente Medical Group, Inc. ("TPMG"). TPMG provides all medical care to more than 4 million Kaiser-Permanente members in Northern California. TPMG employs over 40,000 people with over 8,000 physicians, 6,000 non-represented employees and 25,000 represented employees. TPMG is separate and independent from Kaiser Foundation Health Plan, Inc.

Previously, partner in Hanson Bridgett (2001-2013); senior HR consultant for Mercer, an international human resource, compensation and benefits consulting firm (1992-2001) and partner in Orrick, Harrington and McCutchen, Doyle (1976-1992) and Groom & Nordberg (Washington, DC, 1975).

Government

Legislation Attorney/Counsel (1972-1975) to the Joint Committee on Taxation, U.S. Congress and one of the key staff on the team who wrote ERISA.

Member of Congressional staff team that audited the tax returns of President Richard M. Nixon in connection with impeachment proceedings. Led Congressional staff team investigating use of IRS for political purposes during Nixon and prior Administrations.

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Law Practice Focus

Primary law practice focus has been compensation and benefits, which includes advice, resolving claims and disputes including litigation on pensions, health benefits, disability benefits, employment discrimination, collective bargaining agreements, employee relations, contracts, finances and financial institutions, and trust and fiduciary issues.

Clients have included private organizations and public agencies including public sector retirement systems as CalPERS, publicly traded and privately held companies, the country's largest Taft-Hartley retirement plan (Western Conference of Teamsters Pension Trust Fund), the University of California, Stanford University, over a dozen large joint labor/management board California county retirement systems, the State of California and California counties, cities, and districts.

Litigation and Disputes

Co-led teams in major class action or association lawsuits involving retiree health benefits and pensions. E.g., *Sonoma County Association of Retired Employees vs. Sonoma County* (9th Cir., 2013).

Led teams in disputes with and audits by IRS and Labor Department, including one of the largest non-corporate tax audits, with successful resolution ("no change").

Legislation and Regulation

For clients, developed federal tax legislation that has been enacted. Also developed and drafted California legislation which established new pension benefits and innovative methods of funding retiree health benefits for public agency employees. Additionally, developed IRS tax rulings (both "public" and "private").

Author and Speaker

Nationally recognized author and speaker on tax and benefits issues for the American Law Institute – American Bar Association; California State Association of Counties, League of California Cities and other organizations. I have provided over 60 hours of CLE training.

Honors and Awards

- Fellow, American College of Tax Counsel
- Northern California Superlawyers (2004 – 2013)

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Bar Admissions

- California and District of Columbia
- U. S. Supreme Court
- U.S. Court of Appeals for the Ninth Circuit
- U.S. District Court, Central District of California
- U.S. District Court, Northern District of California
- U.S. Tax Court

Education

- B.A. University of California, Berkeley (Economics; Highest Honors; Phi Beta Kappa)
- M.A. University of California, Berkeley (Economics; advanced to candidacy for Ph.D; dissertation not completed)
- J.D. University of California, Berkeley (Order of Coif; California Law Review)

Presentations And Publications

Presentations and publications include the following

- 2013 - Affordable Care Act – Lead drafter of Hanson Bridgett client article; organized, led and drafted materials for client webinar; co-presenter for webinar sponsored by California State Association of Counties and League of California Cities; co-presenter for webinar sponsored by Public Retirement Journal; presenter at PERSPAC February 2013 conference.
- 2013 and 2012 - California Public Pension Reform – Lead drafter of Hanson Bridgett client article; organized, led and drafted materials for client webinar; author "Opportunities to Save Pension Costs Through Collective Bargaining After Pension Reform", *Western City*; "PEPRA, Selected Issues", League of California Cities Spring Conference.
- 2013 – Payroll Tax Risk – County Counsel Association
- 2012 – IRS payroll tax audits – County Administrative Officers Conference
- 2011 – Pension Reform Landscape and Opportunities – County Counsel Association
- 2001-2013 - State Association of County Retirement Systems – multiple presentations to Association attorneys and administrators on issues including: disability benefits,

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contribution rate relief; deferred compensation, pension reform, retiree health benefits; and California Supreme Court developments.

- 1979-2008 - American Law Institute – American Bar Association ("ALI-ABA") – Over 60 presentations and articles on multiple tax and benefits issues involving all aspects of employee benefits, including finance, fiduciary issues, regulatory issues, compensation design, attorney ethics, health care, pensions, and U.S. Supreme Court developments