

CLASS SPECIFICATION
Insurance Specialist

FLSA Status: Exempt
Union Representation: Nonrepresented

GENERAL PURPOSE

Under general supervision, plans, develops, organizes, implements and coordinates the administration of the Owner Controlled Insurance Program (OCIP); assists in managing elements of the OCIP; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

An Insurance Specialist is responsible for performing a variety of specialized duties in administering the OCIP and co-managing a comprehensive insurance program for construction of major capital improvement projects of significant value. The incumbent assists with the development of policies and procedures; ensures compliance with state insurance administrative rules, regulations and laws; analyzes and evaluates insurance policies; manages the contractor enrollment process; actively builds program support and coordinates activities with external and internal managers and vendors; and assists with the preparations and monitoring of contracts. Work entails the application of technical owner controlled insurance program knowledge and experience. An Insurance Specialist is expected to work independently and exercise sound judgment and discretion in dealing with all interested parties to protect the interests of the City.

An Insurance Specialist is distinguished from Safety & Risk Officer in that incumbents in the latter class may have supervisory responsibility and performs work of greater complexity in a wider variety of situations.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

1. Organizes and manages the contractor enrollment process; develops and maintains insurance and enrollment procedures manual; manages enrollment for insurance coverage of contractors of all tiers under the OCIP; manages program and insurance regulatory compliance; plans, coordinates and integrates OCIP work activities with contractors, project managers, construction managers and other City employees and bureaus.
2. Gathers, reviews and analyzes project exposure data; gathers and disseminates underwriting data to brokers and carriers; monitors binding of coverages; maintains insurance policies and endorsements; maintains and processes premium billings and allocation summaries; interprets insurance policy

coverages and exclusions for contractors, project managers, construction managers and other City employees and bureaus; monitors legislation and other developments pertaining to OCIPs; monitors compliance with local, state and federal insurance laws and regulations.

3. Assists management and project staff to develop and implement a program that complies and conforms to capital improvement program requirements; disseminates information about the program, projects and policies to project staff, other City employees and bureaus, the media, the general public or related organizations or groups; develops and facilitates training of stakeholders; develops program partnerships with internal and external stakeholders; addresses questions and requests from various parties; facilitates resolution of public relations problems.
4. Develops OCIP contract specifications; reviews and recommends changes to bid specifications to conform to OCIP provisions; coordinates OCIP bidding and contract award activities with project managers, construction managers, other City employees and bureaus, contractors and insurance broker; collects appropriate data for estimation of annual exposure and resulting premium payments.
5. Reviews and monitors losses for each insurance coverage area; coordinates and facilitates claims management activities with appropriate parties; monitors litigated claims for each coverage area; processes loss payments; process deductible charges against contractors.
6. Works with Senior Risk Specialist in developing and implementing a comprehensive safety and loss control program for construction activities.

OTHER DUTIES

1. Coordinates financial activities in the areas of purchasing and accounts payable and receivable; monitors budget requests and expenditures for accuracy and appropriate budget accounts; analyzes and monitors OCIP costs and projects annual expenditures.
2. Assists in the development, preparation and processing of bid documents, purchase requisitions, contracts for insurance consultative and brokerage services, interagency agreements and other ordinances, reports and resolutions.
3. Assists with special projects as assigned.

MINIMUM QUALIFICATIONS

Knowledge of:

1. OCIP principles and practices, trends and developments, policies and procedures.
2. Risk management and risk financing principles and procedures.
3. Insurance statutes, regulations and practices, general lines of insurance, insurance underwriting practices, insurance contract language.

4. Property, casualty and liability insurance industry trends and practices.
5. Principles, practices, tools and techniques of effective program planning and management.
6. Principles and practices of public administration, including purchasing, contracting and maintenance of public records.
7. Budgetary practices, procedures and controls.
8. Methods and techniques for conducting statistical and financial analyses.
9. Record keeping principles and practices.
10. Financial management principles and practices.
11. Methods and techniques for partnership building.
12. Principles and practices of sound business communication.

Ability to:

1. Plan, organize, manage and direct a variety of complex program functions and activities to achieve program goals and objectives.
2. Coordinate program activities with multiple stakeholders and facilitate development of partnerships.
3. Operate a computer using word processing and other business software.
4. Analyze complicated liability claims issues and problems, evaluate alternatives and make appropriate recommendations.
5. Exercise sound independent judgment within established guidelines.
6. Understand, interpret, explain and apply complex rules, regulations, laws, ordinances, policies and procedures.
7. Prepare clear, concise and accurate reports and correspondence.
8. Ensure the maintenance of all required program records, documentation and specialized files.
9. Communicate clearly and effectively, orally and in writing.
10. Establish and maintain effective working relationships with employees, third party administrators, legal counsel, City managers and supervisors and others encountered in the course of the work.

Training and Experience:

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a four-year college or university with major course work in finance, business, public administration or a closely related field; and at least one year of progressively responsible insurance administration experience; or an equivalent combination of training and experience. Experience in a public agency is preferred.

Licenses; Certificates; Special Requirements:

Property and Casualty Insurance license issued by the state and certification as an Associate in Risk Management is highly desirable.

A valid state driver's license may be required for certain assignments.

PHYSICAL AND MENTAL DEMANDS

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depends, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring bureau to accommodate the limitation.

Class History:

Adopted: 07-01-02

Revised:

0962 ASSISTANT PROGRAM SPECIALIST. Adopted 07-01-92.

June 2009 - Change Job Class number from 7176 to 30000476, due to system change.