

CLASSIFIED

RISK MANAGEMENT TECHNICIAN

OVERALL JOB PURPOSE STATEMENT

Under the direction of the Director of Purchasing/Risk Management, the job of Risk Management Technician performs specialized technical support and administrative duties for the District in the areas of insurance risk, risk control, loss analysis, property & liability claims and litigation, staff training and consultations, occupational safety and environmental health, regulatory compliance and budgeting; assure compliance with applicable laws, codes, rules and regulations.

DISTINGUISHING CHARACTERISTICS

The Risk Management Technician is a specialized classification that performs complex technical and administrative duties within clearly established systems and procedures in support of functions such as insurance risk, risk control, loss analysis, property and liability claims and litigation, staff training and consultations, occupational safety and environmental health, regulatory compliance and budgeting; assure compliance with applicable laws, codes, rules and regulations.

ESSENTIAL FUNCTIONS

- Support management in the processing of incoming liability and property loss claims and in the handling of in-house claims not managed by the District's TPAs; maintain files and monitor claims making sure the District responds to deadlines and statutes of limitations; prepare and mail legal notices on claims not processed by the District's TPAs.
- Support management in the investigation of injuries, vehicle and public accident incidents; assure proper procedures are followed; assist with the review and follow-up of injury and loss reports with a focus on prevention.
- Answer telephones and greet visitors; respond to inquiries from staff, the public and outside agencies regarding risk management policies and procedures; operate a variety of office equipment including a computer and assigned software; maintain calendar for Risk Management Department
- Prepare work orders and requisitions for department; receive, sort and distribute incoming mail and supplies; compose departmental correspondence; distributes a variety of risk management related information to staff and community members; maintain supply and equipment records.
- Assure payments from property/liability funds are paid on time; assist Purchasing and Finance departments with reviewing items submitted for purchase or reimbursement by others for appropriate use in the District.
- Assist in responding to subpoenas and Public Records Act requests; assist with preparation for pre-trial discovery and depositions; schedule conference rooms and witnesses for depositions.
- Maintain effective communication with claims adjustors, defense attorneys, insurance company representatives and Joint Powers Authority (JPA) personnel regarding claims and litigation.
- Maintain District-wide database on property and liability claims; analyze loss data and trends to identify opportunities for improvement.
- Assist the Maintenance & Operations Department with review of facility use requests to assure adequacy of insurance coverage, additional insured endorsements and risk-transfer agreements; arrange for issuance of Certificates of Insurance for outside agencies and

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contractors; review agreements, facility use permits and consultant contracts for proper insurance requirements.

- Provide monitoring support of expenses and contracts for a variety of programs such as General Property and Liability, Excess Liability coverage; prepare and submit requisitions and monitor expenses for property and liability expenses.
- Assist in assuring Comprehensive Safe School Plans and District Emergency Operations Center are current and properly utilized; assist in assuring District departments, offices and sites have current plans.
- Coordinate AED maintenance with school sites and order AED supplies.
- Coordinate and assist school sites with maintenance and upkeep of Hazardous waste materials program (HAZMAT business plan, HAZMAT waste disposal, EPA Permit management).
- Process claims related to damage of District property or vehicles.
- Establish and maintain claim files; assist with the preparation of various reports and summaries regarding claims and litigation and performance of insurance programs; revise and prepare forms or manuals for use throughout the District regarding safety or liability issues.
- Contact law enforcement, insurance companies, business and private parties to arrange for recovery of monies due to the District from losses caused by accidents or vandalism to District property.
- Prepare a wide variety of reports and summaries related to assigned activities; maintain confidentiality of sensitive and privileged information.
- Attend a variety of meetings, conferences and workshops to maintain current knowledge of applicable laws, codes, rules and regulations; monitor new legislation affecting assigned activities; prepare and deliver oral presentations as needed or requested; as requested, attend meetings in the absence of the Director of Purchasing/Risk Management.

OTHER FUNCTIONS

- Provide preliminary ergonomic assessments.
- Monitor compliance and record of independent study P.E. documentation.
- Assist with the preparation and delivery of staff training regarding insurance and safety procedures, ergonomics, general loss control and prevention; assist in the development of training opportunities.
- Perform a variety of special projects as assigned. Perform job related duties as assigned.

JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

SKILLS are required to perform multiple non-technical and technical tasks with a need to occasionally upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: operating standard office equipment including using pertinent software applications; performing accounting procedures; preparing and maintaining accurate records; and tracking multiple, interrelated detail data and program parameters.

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KNOWLEDGE is required in the understanding of Risk Management and Insurance laws, codes, rules and regulations and of the Regulatory agencies governing Risk Management and Insurance, as well as health and safety regulations. Knowledge of correct English usage, grammar, spelling, punctuation and vocabulary is required. Knowledge of basic budgeting practices regarding monitoring and control, and modern office practices, procedures and equipment is required. Knowledge of record-keeping and report preparation technique and telephone techniques and etiquette is required. Operation of a computer and assigned software is required. Knowledge is required to perform basic math functions including calculation of fractions, percent and/or ratios; to read a variety of manuals, to write documents following prescribed formats and/or present information before groups, and to understand complex multiple step instructions.

ABILITY is required to perform specialized technical support and administrative duties for the District in the areas of risk management including the ability to interpret, apply, explain and keep current on applicable laws, codes, rules, regulations, requirements and restrictions; learn District organization, operations, policies and objectives; prepare and maintain a variety of records, reports and files; understand and resolve issues, complaints or problems; understand and work within scope of authority; compose correspondence and written materials independently; and type or input data at an acceptable rate of speed; gather, collate and/or classify data; work with data of a confidential nature. The incumbent must be able to operate a variety of office equipment including a computer and assigned software; maintain confidentiality of sensitive and privileged information; communicate effectively both orally and in writing; meet schedules and timelines, and adapt to changing work priorities. The incumbent must establish and maintain cooperative and effective working relationships with a diverse population; and meet schedules and timelines. The incumbent must demonstrate effective interpersonal skills such as tact, patience and courtesy when communicating with others in person, on the telephone and through written correspondence; demonstrate flexibility under a wide variety of circumstances; demonstrate the ability to solve problems by analyzing issues, creating plans of action and reaching solutions.

RESPONSIBILITY

Responsibilities include: working under standardized instructions and/or routines focusing primarily on results; providing information and/or advising other persons; and operating within a defined budget and/or financial guidelines. Utilization of some resources from other work units may be required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

WORKING ENVIRONMENT

The usual and customary methods of performing the job's functions requires working in an office and driving a vehicle to an office or outdoor environment to conduct work. The job functions require the following physical demands:

Physical Demands Frequency Definitions Based on an 8-Hour Day:

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

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Seldom or Occasionally	lifting and carrying up to 50 pounds with/without assistance up to 10 feet; pushing and pulling, reach above shoulder, reach at shoulder, stooping/bending
Occasionally	walking, standing, squatting/crouching
Occasionally or Frequently	handling, simple grasping
Frequently	lifting and carrying up to 10 pounds up to 25 feet, neck flexation/rotation, reach below shoulder, fingering/fine manipulation to operate a keyboard and special equipment
Frequently or Continuously	sitting up to one hour in intervals

AUDITORY OR VISUAL REQUIREMENTS

Auditory ability to hear others in order to communicate and make presentations. Vision ability to see near, distant, depth and peripherally

ENVIRONMENTAL CONDITIONS

There is the potential for exposure to chemicals and fumes, for contact with dissatisfied or abusive individuals, and for traffic hazards. Some travel may be required to attend business meetings, conferences or workshops. Must be able to operate a vehicle requiring a California Class C driver's license.

EXPERIENCE

Three years of increasingly responsible clerical and secretarial experience; involving financial or statistical record keeping, reviewing and processing documents for accuracy and compliance with program requirements, and involving public contact. Experience in risk management preferred.

EDUCATION

High school diploma or equivalent supplemented by college-level coursework in business or a related field. Additional qualifying experience may be substituted for the education requirement.

REQUIRED TESTING

Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

CERTIFICATES

Valid California driver's license and a driving record acceptable to the District for insurance purposes.

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including tuberculosis (TB) and drug screen clearances.