

**SANTA CLARA COUNTY OFFICE OF EDUCATION**  
**Personnel Commission**

CLASS SERIES TITLE: Risk Management Technician I/II (ACS)

DESCRIPTION OF BASIC FUNCTION AND RESPONSIBILITIES

To provide technical and specialized support for Risk Management programs including property and liability claims, workers compensation, and safety and environmental health/hazards management; assist department staff in the monitor of County Office exposures, reporting requirements, insurance renewals, department expenditures and other risk management activities.

ALTERNATE CLASS SERIES SPECIFICATIONS

The classes Risk Management Technician I and Risk Management Technician II serve as an alternate class series. Incumbents may be employed in either level depending on their qualifications. Incumbents initially employed in the entry level as Risk Management Technician I may reasonably expect to be reassigned to the journey level of Risk Management Technician II upon the recommendation of the appointing authority and a passing score on qualifying examination(s). In general, it is expected that Risk Management I incumbents will be trained and prepared for reassignment to Risk Management Technician II after a two-year period.

DISTINGUISHING CHARACTERISTICS

The Risk Management Technician I is the entry/trainee level of this class series. Incumbents in this classification receive training and learn the regulations, rules, applicable laws and statues pertaining to risk management. Employees in this level of the series receive direct supervision and guidance within a standard framework of policies and procedures.

The Risk Management II is the journey level of this class series. Employees at this level of the series possess full knowledge of and demonstrate the ability to adhere to the regulations, rules, applicable laws and statues pertaining to risk management. Employees in this level of the series receive general to limited supervision within standard framework of policies and procedures.

ESSENTIAL AND TYPICAL DUTIES: *The following duties are examples of assignments performed by incumbents in this classification. It is not a totally comprehensive list of duties, nor is it restrictive regarding job assignments.*

Researches and prepares a variety of risk management program reports, schedules, statements, budget reports and technical data involving all risk management activities

Supports management in the processing of incoming liability and property loss claims and in the handling of in-house claims not managed by the Office's JPA

Maintains files and monitors claims making sure the County Office responds to deadlines and statutes of limitations

Prepare and mail legal notices on claims

Provides technical support for property and liability claims processing, workers compensation, and safety and environmental health/hazards program management

Maintains, processes and updates records related to property control and real property, ensuring necessary information for insurance values

Reviews program statistical data to develop risk management schedules, loss runs, summaries, and other reports; review computer generated reports for accuracy and completeness and submit corrections, or notify others regarding discrepancies

Assists risk management staff with assigned special projects related to various program needs; provides support to each risk management function as assigned, acting as a resource for the department when new programs are initiated

Prepares a variety of program and project materials including correspondence, bulletins, handbooks, newsletters, documents and exhibits

Gathers and compiles data for federal and state reporting requirements

Assists with the development, evaluation, revision, interpretation and implementation of district policies and procedures related to risk management functions

Contacts schools, classroom sites, departments, local and state organizations, community groups, businesses, special interest groups and federal agencies to provide and obtain information

Coordinates department activities including in-service training programs and makes arrangements for meetings; explains district and department policies and procedures as appropriate

Represents the department at meetings as assigned; travels to meeting locations; screen and schedule appointments and maintain department calendars

Perform related duties as assigned.

## EMPLOYMENT STANDARDS

### Possession of:

A valid Class 3 California Driver's License

Driving record that meets the insurance requirements of the County Office of Education

### Knowledge of:

Effective inventory/property control practices and procedures

Technical aspects of field of specialty

Modern office equipment, practices and procedures

Oral and written communication skills

Interpersonal skills using tact, patience and courtesy

Telephone techniques and etiquette

Correct English usage including grammar, punctuation, spelling, and sentence structure

Ability to:

Operate standard office equipment including microcomputers and related software applications

Communicate effectively orally and in writing

Plan and organize work

Meet schedules and timelines

Maintain records and prepare reports

Work independently with little direction

Effectively operate and desktop computer and assigned software

Keyboard/type accurately at a rate required for successful job performance

Read, interpret, apply, and explain rules, regulations, policies, and procedures

Establish and maintain effective working relationships with all levels of district staff, other organizations and public agencies

EDUCATION AND EXPERIENCE

*Risk Management Technician I:* Generally, the required knowledge and abilities will have been acquired through any combination of education and experience equivalent to one (1) year of formal fiscal-clerical, insurance, accounting, or claims adjusting reporting experience working in an insurance company, public agency, or other related insurance industry setting. Formal course work in public administration, accounting, and business is desirable.

*Risk Management Technician II:* Generally, the required knowledge and abilities will have been acquired through to one (1) year of formal fiscal-clerical, insurance, accounting, or claims adjusting reporting experience working in an insurance company, public agency, or other related

insurance industry setting and at least two (2) years of experience comparable to that of a Risk Management Technician I.

WORKING CONDITIONS:

ENVIRONMENT: Indoor and outdoor environments.

PHYSICAL ABILITIES: Ability to read small print of code, insurance policies and computer printouts; hear and speak to converse over the telephone and in person with others; manual dexterity of hands and fingers to operate a computer keyboard, telephone and other office equipment; sitting or standing for extended periods of time; kneeling, bending at the waist, and reaching overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lifting light objects; hearing and speaking to exchange information and make presentations; move over rough terrain and climb ladders to investigate claims; and seeing to read and write reports.

OTHER CHARACTERISTIC: Must be willing to work such hours as necessary to accomplish the job requirements; ability to drive; travel locally to attend meetings and to investigate claims; travel further distances to attend seminars and conferences.

HAZARDS: Working from heights; potential for exposure to chemicals and fumes; potential for contact with dissatisfied or abusive individuals; traffic hazards.

BARGAINING UNIT: Office, Technical, and Business Services (OTBS) Unit

Approved by Personnel Commission: April 10, 2008

Revised: 11/12/09