

SANTA CLARA COUNTY OFFICE OF EDUCATION
Personnel Commission

CLASS TITLE: Risk Management Specialist

DESCRIPTION OF BASIC FUNCTION AND RESPONSIBILITIES

To perform specialized technical support administrative functions to the County Office of Education in the areas of risk control, loss analysis, claims and litigation, staff training and consultations, occupational safety and environmental health, and regulatory compliance to oversee the administration of contract management; and to assure compliance with applicable laws, codes, rules and regulations.

DISTINGUISHING CHARACTERISTICS

Employees in this classification receive limited supervision within a broad framework of policies and procedures. This job class requires journey-level and specialized knowledge of risk management insurance programs, including the ability to analyze and interpret insurance related policies, procedures, and contracts.

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.*

Performs specialized technical support and administrative duties to the Office in the areas of risk control, loss analysis, claims and litigation and consultations, emergency preparedness, occupational safety and environmental health, contracts management procedures, and regulatory compliance; assures compliance with applicable laws, codes, rules and regulations

Investigates employee and student injuries, vehicle and public accident incidents; interviews involved parties and school personnel to discover essential facts; visits sites and take photos and measurements; assures proper procedures are followed; assists with the review and follow-up of student and staff injury and loss reports with a focus on prevention; provides support as needed in finding placement for Return-To-Work employees

Assists in the planning, development and implementation of workers' compensation, property and liability, certificates of insurance and other risk management programs

Maintains Office-wide database on leased or lease-purchase buildings, portables and equipment; prepares property endorsement requests needed to update Site Statement of Values for insurance underwriting and coverage records; analyzes loss data and trends to identify opportunities for improvement

Maintains all official insurance documents and files as well as insurance policies for special events

Analyzes cost and effectiveness of insurance/self insurance programs; evaluates vendor performance and third party claims administrators

Assures for the proper transference of risk through contracts, protecting the Office in contracts and providing technical assistance in evaluating proposed contracts

Participates in the accounting, administrative, functions of the Schools Joint Powers Agency relating to property/liability insurance and workers' compensation programs,

Prepares, develops, and maintains claims files, and a variety of reports, special forms and manuals, summaries, correspondence, and documents related to assigned risk management functions

Assists with the review of Workers' Compensation claims from the legal and prevention standpoints; reviews supervisor reports and works with Workers' Compensation Coordinator to evaluate the cause of employee accidents

Maintains effective communication with claims adjustors, defense attorneys, parents, law enforcement, insurance company representatives and Joint Powers Authority (JPA) personnel regarding claims, litigation, recovery of monies from losses caused by accidents or vandalism to Office property

Receives, reviews, and records reports of property damage, theft, and vandalism, confirms information, submits claims to insurance carrier and monitors their progress, processes requests for reimbursement within deductible limits

Arranges for issuance of Certificates of Insurance for outside agencies and contractors; reviews insurance certificates and agreements, facility use permits and Consultant contracts for proper insurance requirements

Negotiates contract terms with vendors and other public agencies

Assists in responding to subpoenas and Public Records Act requests; coordinates documents and obtains records in litigated cases related, including, but not limited to, vehicle accidents, personal injury, student accidents, and property locations; processes claims as appropriate

Conducts periodic safety inspections and audits and assures their proper recording and files

Obtains and maintains vehicle ownership and insurance records; oversees the driver safety program

Processes County leased property tax exemption claims, reviewing purchase orders, confirming information, preparing and submitting claim forms

Performs ergonomic evaluations of employee workstations; visits County Office sites; observe employees and take photographs and measurements; follow-ups with supervisors and employees regarding ergonomic recommendations

Monitors work flow processes to ensure that contracts and related documents are processed correctly and in a timely manner

Monitors non-executed contracts, insurance certificates, and performance guarantees for currency and performs related follow-up activities

Attends a variety of meetings, conferences and workshops; participates in the development of, conducts, and presents in-service training and workshops to departments/programs

Operates a desktop computer and utilizes office applications for word processing, presentations and spreadsheet programs

Operates a variety of specialized equipment such as sound and light meters, air quality testers, humidity and temperature meters and force gauges; drives a vehicle to various sites to conduct work

Performs 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:

Risk Management and Insurance laws, codes, rules and regulations

Regulatory agencies governing Risk Management and Insurance

Principles of contract law including insurance certificates

CAL/OSHA, California Health and Safety Codes, and other local, State and Federal regulations and rules

Basis accounting, budgeting, and record-keeping practices and procedures

Modern office equipment, practices and procedures

Oral and written communication skills

Operation of specialized equipment used in loss incident investigation

Interpersonal skills using tact, patience and courtesy

Telephone techniques and etiquette

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

Ability to:

Perform specialized technical support and administrative duties to the County Office in the areas of risk management

Interpret, apply and effectively explain applicable laws, codes, rules and regulations

Analyze and interpret insurance-related contracts and certificates

Understand Joint Power Agency practices and procedures

Understand and work within scope of authority

Establish, prepare, and maintain accurate records and reports related to assigned functions

Communicate effectively in oral and written form

Identify issues, complaints or problem situations determine cause(s), and take appropriate action

Effectively operate and desktop computer and assigned software

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

Meet Compose correspondence and written materials independently

Prepare and deliver oral presentations

Maintain confidentiality of sensitive and privileged information

Maintain current knowledge of program rules, regulations, requirements and restrictions, schedules and timelines

Establish and maintain effective work relationships with those contacted in the course of assigned duties.

EDUCATION AND EXPERIENCE

Generally, any combination of education and experience that demonstrates the required knowledge and abilities will be considered as qualifying. A typical method of demonstrating these qualifications would be:

- Bachelors degree from accredited college or university with major coursework in business administration, public administration, occupational or environmental health or a related field
- Two years of increasingly responsible experience in business or public administration preferably including one year of experience in institutional risk management insurance programs, contracts administration, workplace safety, environmental health or another related area.

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 CHARACTERISTICS: 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.

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

Personnel Commission Approval: 08/01/84

Revised: 07/08/85, 1/86, 1/26/99, 06/21/01, 04/10/08