

### POSITION DESCRIPTION

Special Districts Association of Oregon believes that each employee makes a significant contribution to our success. That contribution should not be limited by the assigned responsibilities. Therefore, this position description is designed to outline primary duties, qualifications and job scope, but not limit the incumbent nor the organization to only the work identified. It is expected that each employee will offer his/her services wherever and whenever necessary to ensure the success of SDAO.

**Title:** Interim Assistant Underwriting Manager

**Department:** Accounting

**Exempt/Non-Exempt:** Exempt

**Reports To:** Chief Financial Officer

**Pay Equity Group:** 4435452443422

**Effective Date:** January 2021

New position       Position change

---

#### **General Position Summary:**

The Interim Assistant Underwriting Manager is responsible for providing assistance to the Underwriting Manager of the Special Districts Insurance Services Trust property, casualty and workers compensation programs as well as the PACE (Public and Casualty Claims for Education) property and casualty program

#### **Essential Functions/Major Assignments:**

- Assist and support the Underwriting Manager with all duties and functions with the overall objective to be to understand the role and act in the capacity of the Underwriting Manager when needed
- Function in capacity of Sr. Underwriter/Systems Analyst
- Upon directive of the Underwriting Manager ensure the SDIS Trust and PACE Trust are consistently informed and updated on what is occurring in the Underwriting department
- Assist in the development and implementation of a rating plan each policy year based on the annual budget
- Assist in the development of exposure/loss trend reports for review
- Assist in the development and maintenance of the underwriting manual for SDIS and PACE.
- Assist in the development of exposure/loss trend reports for review by the Insurance Services Committee and the Board of Trustees.
- Analyze the annual actuarial study to determine adequate rates and identify trends.
- Assist with development of the annual budget upon direction from the Underwriting Manager
- Administer SDIS's Longevity Credit Program.
- Assist the Underwriting manager in making pricing, renewal and deductible decisions for each member of SDIS and PACE; in doing so learn the process and be able to apply
- Analyze pricing compared to exposure to make sure rates are adequate.
- Contribute to and be responsible for maintenance of the Trust and PACE coverage documents, including but not limited to;
  - Developing a clear understanding of all coverage sections.
  - On an annual basis, identify any coverage changes that need to be made for members; this is completed by an annual review of coverage reports, claims and loss; work in concert with the Insurance Services Committee to discuss changes to resolution

- Communicate directly with reinsurance broker to ensure their approval for any changes to coverages
  - Implementing coverage changes and distribute revised documents to the members.
- Work in concert with the Underwriting Manager to ensure, via comparing reinsurance documents to the Trust's documents, that there are not any gaps in coverage or missing endorsements
- Work with the Underwriting Department to deliver all necessary renewal update materials and documents to members.
- Work with the Accounting Department to make sure all reinsurance payments are promptly made and verified.
- Work with the Risk Management Department to identify unacceptable risks and address them with coverage restrictions.
- Work with reinsurance broker to negotiate reinsurance pricing, terms, conditions and limits of coverage.
- Provide assistance to the Underwriting Manager to maintain and organize all reinsurance documents.
- Upon request, answer coverage questions from members and independent insurance agents.
- Communicate regularly with independent insurance agents to explain coverage and pricing issues.
- In concert with the Underwriting Manager, oversee the contracts with outside appraisal companies.
- Work with the Underwriting Manager to review and approve all new quote all new quotes sent to prospective members.
- Responsible for all insurance program coverage documents and documentation
- Cooperatively, with the claims department liaison, compare reinsurance documents to the Trust's documents to make sure that any gaps in coverage or missing endorsements are identified.
- Assist with policy changes, updates, additions, deletions regarding insurance products
- In collaboration with the Insurance Services Committee, make decisions on coverage for unique exposures.

**Secondary Functions:**

- All other duties as assigned

**Job Scope:**

- The Interim Assistant Underwriting Manager is required to analyze problems, concepts and make decisions on that information. Coupled with this responsibility is the requirement for the prudent use of SDAO financial assets.
- The Interim Assistant Underwriting Manager is expected to perform with a high degree of independence. Work requires extensive decision-making.
- The Interim Assistant Underwriting Manager is required to establish plans and set goals for the department; must consider options and contingencies and must include methods for handling any difficulties encountered.

**Supervisory Responsibility:**

- Provides full supervisory function over two employees

**Interpersonal Contacts:**

- The Interim Assistant Underwriting Manager has regular communication with customers outside and outside of SDAO, including Board members, insurance agents and members, with the purpose of gathering information, exchanging of ideas, presentation of results etc.
- The Interim Assistant Underwriting Manager regularly will develop new processes and procedures within the underwriting department as needed upon direction of the Underwriting Manager

**Specific Job Knowledge Skill an Ability:**

- Knowledge of pools and the insurance marketplace or ability to learn

- Must have a solid knowledge of property and casualty products, underwriting operations and processes
- Knowledge of management and project management concepts
- Ability to work cohesively with the Underwriting Manager to be able to provide support and function as the Underwriting Manager in their absence
- Ability to present information to wide audience or ability to learn to present complex information in clear manner
- Ability to adapt to changing environment
- Must be able to make sound decisions and have good judgement
- Ability to successfully complete multiple tasks concurrently within a fast-paced, team-oriented, working environment
- Skill in data analysis
- Must have excellent analytical skills
- Must possess excellent verbal and written communication skills as well as strong negotiation skills; includes active listening, and presenting findings and recommendations
- Ability to travel and spend multiple nights away from home.

**Specific Job Effort:**

- The Interim Assistant Underwriting Manager regularly assesses risk, analyzes options and makes decisions and recommendations on best practice or guidance, often without complete information with review and approval from the Underwriting Manager

**Education, Experience, and Certification/Licensure:**

**Required**

- Bachelor’s degree
- Minimum four years’ experience as an Underwriter for an insurance company or self-insured pool
- State of Oregon Insurance License required  
OR
- An equivalent combination of education, training and experience sufficient to successfully perform the essential duties of the job

**Desired/Preferred**

- Previous supervisory experience strongly desired

**Job Conditions:**

- This position operates in a professional office environment
- Routinely uses standard office equipment, especially computers and mobile devices
- In performance of the duties of this job, the employee is occasionally required to stand; walk; sit; use hands and fingers to handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; talk or hear
- The employee must occasionally lift or move office products and supplies, up to 20 pounds.
- This position requires overnight travel
- Typical work schedule is Monday through Friday during regular business hours, but does require flexibility of schedule to meet the demands of the position

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

*(The signature of the employee indicates this document has been read and is understood.)*

\_\_\_\_\_  
Interim Assistant Underwriting Manger

\_\_\_\_\_  
December 2020

**Supervisory Approval**

**Date**

(The signature of the Supervisor confirms the assignment of work to the employee.)