



## DIRECTOR OF RISK AND INSURANCE MANAGEMENT

**JC:** XF106  
**PB:** 10  
**FLSA:** Exempt

**BU:** 95 (NR)  
**Created:** May 2002  
**Revised:** June 2019

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

### **DEFINITION**

Under general direction, plans, directs, manages and oversees the activities and operations of the Insurance Department within the Office of Controller/Treasurer including administering the District's comprehensive liability insurance, loss control, and associated risk management functions; coordinates assigned activities with other divisions, departments, and outside agencies; provides highly responsible and complex administrative support to the Controller-Treasurer, and performs related duties as assigned.

### **CLASS CHARACTERISTICS**

This single position class manages activities related to a broad functional area of risk management. The incumbent is required to be proactive and creative in the development, implementation and administration of loss control programs and activities, including but not limited to property damage, personal injury of patrons, insurance, and subrogation. The incumbent is accountable for accomplishing all departmental goals and objectives and for furthering District goals and objectives within general policy guidelines.

### **REPORTS TO:**

Controller – Treasurer or designee.

### **EXAMPLES OF DUTIES** – *Duties may include, but are not limited to, the following:*

1. Assumes full management responsibility for assigned services and activities of the District's insurance program including administration of a comprehensive liability insurance, loss control, and risk management program.
2. Manages and participates in the development and implementation of goals, objectives, policies and priorities for assigned programs; recommends and administers policies and procedures.
3. Monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; recommends, within departmental policy, appropriate service and staffing levels.
4. Selects, trains, motivates and evaluates assigned personnel; provides or coordinates staff training; works with employees to correct deficiencies; implements discipline and termination procedures.

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5. Plans, directs, coordinates and reviews the work plan for assigned staff; assigns work activities, projects and programs; reviews and evaluates work products, methods and procedures; meets with staff to identify and resolve problems.
6. Oversees program coordination with District management staff regarding loss control and risk management activities and issues; develops strategies to optimize the District's insurance coverage; ensures all programs comply with mandated requirements.
7. Determines and recommends appropriate levels of risk assumptions for insurance programs; forecasts appropriate reserves; develops methods and procedures for claims management.
8. Determines the allocation of loss control costs to District departments; researches and evaluates financing alternatives; negotiates the purchase of appropriate levels of insurance.
9. Develops effective loss control techniques; recommends and implements loss control programs to reduce District's loss potential; evaluates impacts on District operations.
10. Oversees and participates in the development and administration of the departmental budget; approves the forecast of funds needed for staffing, equipment, materials and supplies; approves expenditures and implements budgetary adjustments as appropriate and necessary.
11. Serves as the liaison for the Insurance Department with other divisions, departments and outside agencies; negotiates and resolves sensitive and controversial issues.
12. Serves as staff on a variety of boards, commissions, and committees; prepares and presents staff reports and other necessary correspondence.
13. Provides responsible staff assistance to the Controller-Treasurer.
14. Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of liability insurance, loss control, and risk management.
15. Responds to and resolves difficult and sensitive citizen inquiries and complaints.

## **QUALIFICATIONS**

### **Knowledge of:**

- Operational characteristics, services and activities of an insurance program including liability insurance, loss control, property damage, personal injury, and risk management
- Principles and practices of operating and capital budgets
- Principles and practices of program development and administration
- Methods and techniques for risk management identification and analysis
- Methods and techniques for risk containment and cost control
- Methods and techniques of mathematical and statistical analysis
- Methods and techniques of financial and cost/benefit analysis
- Principles and practices of budget preparation and administration

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- Principles of supervision, training and performance evaluation
- Related Federal, State and local laws, codes and regulations

### **Skill/Ability in:**

- Overseeing and participating in the management of a comprehensive insurance program
- Overseeing, directing and coordinating the work of lower level staff
- Selecting, supervising, training and evaluating staff
- Participating in the development and administration of departmental goals, objectives and procedures
- Preparing and administering large program budgets
- Preparing clear and concise administrative and financial reports
- Analyzing problems, identifying alternative solutions, projecting consequences of proposed actions and implementing recommendations in support of goals
- Researching, analyzing and evaluating new service delivery methods and techniques
- Evaluating District liability insurance and loss control requirements
- Interpreting and applying applicable Federal, State and local policies, laws and regulations
- Communicating clearly and concisely, both orally and in writing
- Establishing and maintaining effective working relationships with those contacted in the course of work

### **MINIMUM QUALIFICATIONS**

#### **Education:**

Possession of a bachelor's degree in business, public administration or a related field from an accredited college or university.

#### **Experience:**

The equivalent of seven (7) years of (full-time equivalent) verifiable professional experience in insurance and/or risk management programs, which must have included at least three (3) years of management experience.

#### **Substitution:**

Additional professional experience as outlined above may be substituted for the education on a year-for-year basis. A college degree is preferred.

### **WORKING CONDITIONS**

#### **Environmental Conditions:**

Office environment; field environment; construction site environment; exposure to heat, cold, moving vehicle, electrical energy and inclement weather conditions.

#### **Physical Conditions:**

May require maintaining physical condition necessary for walking, standing or sitting for prolonged periods of time.

**BART EEO-1 Job Group:** 0500 – Executives/Managers  
**Census Code:** 0430 – Miscellaneous Managers  
**Safety Sensitive:** No