



JOB DESCRIPTION

Director of Trusts

OUR MISSION

The mission of the Pennsylvania Municipal League is to strengthen, empower and advocate for effective local government.

POSITION SUMMARY

This position involves all facets of managing and directing the PennPRIME Liability Trust, the PennPRIME Workers' Compensation Trust and the U•COMP Unemployment Compensation Trust. Duties include overseeing marketing, loss control, claims, underwriting, and member relations. Administrative areas such as budgeting, policy development, and public speaking are also included in the job facets.

GENERAL INFORMATION

Job Title: Director of Trusts

FLSA Status: Exempt

Reporting Relationships: Reports to the Deputy Executive Director—Operations. Supervises Trusts Member Services Manager and Insurance Services Representative.

Travel: This position involves travel within the state to attend meetings and events. This position also involves travel requiring overnight stays, including occasional out-of-state travel. A valid driver's license, satisfactory driving record and the ability to maintain one throughout employment are required.

Work Hours and Location: This position may be required to work beyond a normal work week to accomplish goals and may also be required to attend meetings or events outside of normal business hours. Schedules are flexible as are work sites, including occasional work-at-home options, depending upon operational needs.

Physical Demands and Work Conditions: This position requires work in an office setting. Regular use of a computer is required and communication in person and by phone is also expected. An employee in this position is also required to travel to meetings and make public presentations. While staffing meetings, programs, conferences, conventions, and other events, and completing related duties, this position will require walking and standing for extended periods. This position may also require moving light objects weighing less than 20 pounds such as mail, supplies, and files.

ESSENTIAL JOB DUTIES

An employee in this position is required to perform the following essential functions with or without reasonable accommodation. This is not intended to be an exhaustive list of duties.

1. Lead and direct all operations for three trusts, including the following:
 - ◆ Monitor claims on a regular basis
 - ◆ Attend claim mediations, arbitrations or trials for pertinent claims
 - ◆ Work with marketing, underwriting and loss control for all current and prospective members
 - ◆ Communicate with members and brokers
 - ◆ Prepare budgets and review financial data with the help of the Director of Finance
2. General management of staff, including the following:
 - ◆ Meet regularly to coordinate efforts, check workload, find capacity, and assign projects
 - ◆ Meet with staff to discuss specific topics, problems and special projects
 - ◆ Coordinate annual risk
 - ◆ Conduct performance reviews and mid-term reviews as needed
3. Management/coordination with consultants and third-party administrators, including
 - ◆ Consultants on underwriting, claim processing and loss control
 - ◆ Attorneys
 - ◆ Accounting, actuarial, and auditing firms
4. Member management and education
 - ◆ Visits and meetings with members and brokers
 - ◆ Conduct presentations at conferences and other meetings
5. Board meeting preparation
 - ◆ Create, prepare and manage the development and distribution of board materials
 - ◆ Conducting meeting with board chairs to review agendas and action items
 - ◆ Attend subcommittee and board meetings
 - ◆ Report on trust activity to The League Board of Directors
7. Professional Development
 - ◆ Attend local, state and national conferences and meetings of related groups
 - ◆ Maintain designations and insurance licensure
 - ◆ Take advantage of other professional development opportunities

CORE COMPETENCIES

Employees are expected to continually strive to achieve these core competencies, which are central to success within this position and to the overall advancement of our culture and mission.

Initiative/Entrepreneurial Spirit

- ⇒ Dynamic, creative, self-starter
- ⇒ Tackles problems head-on and seeks continuous improvement
- ⇒ Avid learner - actively pursues professional development, training, and cutting-edge technologies

Teamwork/Internal Communication

- ⇒ Collaborative - making a deliberate effort at inclusion across departments
- ⇒ Recognizes that diversity of perspectives is the key to true innovation
- ⇒ Professional in interactions and consistently respectful of everyone

Customer Service/External Communication

- ⇒ Approachable and responsive
- ⇒ Acts as an ambassador of The League
- ⇒ Expert public speaker - capable of making effective public presentations, as well as effectively communicating and promoting our message and mission in informal settings

Judgment/Decision Making

- ⇒ Strategic risk-taker - anticipates and plans for issues/challenges
- ⇒ Demonstrates sound judgment in following established policy, while knowing when to exercise appropriate discretion or lobby for change
- ⇒ Decisive and willing to make tough decisions
- ⇒ Exercises discretion in handling confidential information

Adaptive/Flexibility

- ⇒ Pushes beyond the status quo to make The League better each day
- ⇒ Welcomes change and promotes the acceptance of change among others
- ⇒ Knowledgeable about local government, Pennsylvania, and the role of a state league

Results Orientation/Productivity

- ⇒ Demonstrates their commitment to The League through reliable attendance and overall dependability
- ⇒ Ensures that work product is of the highest quality, delivered on time through effective delegation and use of resources.

Leadership

- ⇒ Leads with emotional intelligence
- ⇒ Motivated by mission, prioritizing the advancement of The League
- ⇒ Effectively communicates The League's vision
- ⇒ Honest and forthright, maintaining confidences and speaking of others constructively
- ⇒ Takes responsibility for successes and failures, and uses failure as an exercise to improve

Budget/Financial Management

- ⇒ A good steward of The League's resources, searching for efficiencies and identifying opportunities to generate additional revenue
- ⇒ Adheres to financial policy and established budgets

Strategic & Project Planning

- ⇒ Participates in developing long-range plans and shorter-term objectives
- ⇒ Creates project plans and monitors progress of operation areas of The League's strategic plan
- ⇒ Thinks strategically

Staff Management

- ⇒ Recognizes that The League is only as strong as our team
- ⇒ Prioritizes staff development
- ⇒ Effectively delegates and fairly distributes opportunities to succeed, continually challenging staff to stretch and grow
- ⇒ Actively monitors staff performance, provides feedback and coaching, and encourages training and professional development

CORE QUALIFICATIONS

These minimum and preferred qualifications and positional requirements are necessary to successfully perform the essential functions of this position. This is not intended to be an exhaustive list.

Education, Experience, & Subject Matter Expertise: The League intends that its directors command respect as an expert within their professional field. Formal degrees and professional certifications may advance this objective. Therefore:

- ◇ A minimum of 5 years of commercial lines insurance experience.
- ◇ While a Bachelor's Degree is a plus, a combination of insurance education and experience working with commercial lines is acceptable.
- ◇ Direct customer management with at least 2 years' experience.
- ◇ Experience working with multiple levels of customer management and staff.
- ◇ Experience leading customer integration process.
- ◇ Possess a valid/current Property and Casualty Producers License. Life and Disability Producer License is a plus.

Skills and Abilities: A director at The League is responsible for ensuring the operations within their span of control function. Furthermore, a director has a central role in advancing the League's objective to inspire its membership. The candidate must also have:

- ◇ A strong understanding of the pooling and group purchase philosophy and how to communicate it to members and prospective members.
- ◇ Specific knowledge of self-insured and hybrid placement of insurance.
- ◇ Understanding and following oral and written instructions given in the English language is required.
- ◇ Sufficient knowledge and skill in the use of standard office software is required.
- ◇ The ability to master an organization-specific membership database and specialized applications related to departmental function is required.
- ◇ The ability to work under changing priorities and short deadlines is required.
- ◇ The ability to establish and maintain effective working relationships with the general public, co-workers, elected and appointed officials and members of diverse cultural and linguistic backgrounds regardless of race, religion, age, sex, disability or political affiliation is required.