



JOB DESCRIPTION

INSURANCE SERVICES REPRESENTATIVE

OUR MISSION

The Pennsylvania Municipal League strengthens and empowers effective local government through advocacy, education, and support for our members.

POSITION SUMMARY

This position is responsible for assisting the Director of Trusts, Trusts Member Services Manager, and other Trust staff members with billing, new business, and renewals of liability and workers' compensation trusts. This position is also tasked with regularly communicating with trust members, third-party administrators, board of trustee members, and internal staff on a wide range of insurance trust related tasks. This position will also provide administrative support.

GENERAL INFORMATION

JOB TITLE	Insurance Services Representative
FLSA STATUS	Non-exempt
REPORTING RELATIONSHIPS	Reports to: Director of Trusts
TRAVEL	This position involves travel within the state, as well as occasional out-of-state travel to attend meetings and events, which may also require overnight stays. A valid driver's license, satisfactory driving record, and the ability to maintain one throughout employment are required.
WORK HOURS & LOCATION	This position may require you to work beyond a normal work week to accomplish goals and 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 & WORK CONDITIONS	This position requires work in an office setting and the ability to clearly communicate in-person and by phone is expected. 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. Manage all clerical duties, including drafting letters and coordinating schedules and appointments for Director of Trusts.
2. Handle incoming phone calls, either assisting the caller or forwarding to the proper party.
3. Maintain billing, request checks, and work with Finance and Administration Department. Complete commission statements for existing brokers.
4. Maintain membership database, i.e. Customer Relationship Management System.
5. Maintain files as requested by the Director of Trusts.
6. Assist with the retention of members by developing strong relationships.
7. Prepare Certificates of Insurance for signature of Trusts Member Services Manager or Director of Trusts.
8. Review member submissions for accuracy and completeness and follow up for additional information if necessary.
9. Assist in renewal process for liability and workers' compensation trusts, including early preparation of renewal documents, and sending current applications and assisting with completion.
10. Review new business applications for completeness, including loss runs, financials, and budget. Coordinate with underwriters, agents, applicants, and Director of Trusts on entire application process.
11. Handle all member billing, including sending invoices and posting payments.
12. Assist third-party service providers during worker compensation audits and appraisals of property.

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

- High school diploma required; minimum of associate's degree preferred.
- Minimum of 2 years of Office and Administrative experience required.
- Property & Casualty license preferred or ability to secure certification.
- Willingness to pursue insurance related education to enhance customer service skills preferred.
- Proficient in Microsoft Office.

SKILLS & ABILITIES

- Strong interpersonal and communication skills with the ability to effectively work independently and collaboratively with internal staff, partners and members of the Trusts.
- Highly organized with efficient time management skills and attention to detail.
- Strong project management skills.
- Prompt and dependable attendance.
- Understanding and following oral and written instructions in the English language is required.
- Ability to multi-task, be resourceful and proactive.
- 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.
- Must be outgoing and professional.