

**UNIFIED PERSONNEL SYSTEM**

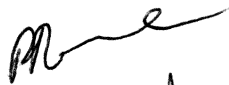
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III.3



Peggy Rowe  
Director

TO: Robert S. LaSala, County Administrator

FROM: Peggy Rowe, Director of Human Resources 

DISTRIBUTION: Carl Harness, Assistant County Administrator  
Virginia Holscher, Bureau Director, Risk Management 

SUBJECT: Audit of One (1) Encumbered Risk Management Technician Position BCC/C2796  
(Pay Grade CL13) in the Risk Management Department (RM)

DATE: December 21, 2011

As requested, the Human Resources Department has reviewed the duties and responsibilities assigned the subject position. This position was last reviewed in 2009. Our recommendation is as follows.

**RECOMMENDATION**

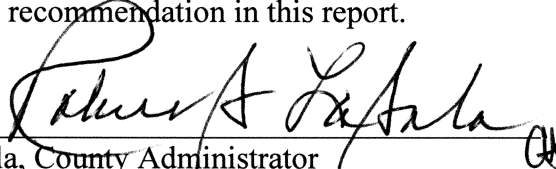
It is our finding that the duties and responsibilities assigned to the subject position number BCC/C2796 remain at the level of the current classification. It is therefore recommended that the position's assigned duties and responsibilities remain classified as Risk Management Technician, pay grade CL13.

**ANALYSIS**

The duties and responsibilities of this position have been allocated to the classification of Risk Management Technician, pay grade CL13. In the past, the position was assigned administrative and technical support on a broad range of tasks in risk management operations with a primary emphasis on tasks implementing administrative functions, administrative reports, intra-department personal computer software applications support, and other assignments.

In 2009, some additional risk management technical, semi-professional tasks, and new duties were assigned to this position following the layoff of the organization's Risk Management Analyst. Between 2008 and today, the number of positions within Risk Management were reduced from approximately 17 to 12. The overall subject nature and variety of tasks and duties assigned to this position has evolved in the period following the 2009 staff reductions and departure of the unit's Risk Management Analyst and other staff.

I agree with the recommendation in this report.

  
Robert S. LaSala, County Administrator

12-21-11  
Date

**ANALYSIS (continued)**

Prior to the departure of the Risk Management Analyst, pay grade CL16 incumbent in 2009, this position assisted and supported the work of the higher level position and thus obtained experience in supporting the former Risk Management Analyst's workload. In addition, the incumbent completed and continues to complete computer based training, engages in self-development, researches assignments, refers to industry manuals, and applies guides when performing new assignments. The incumbent performs semi-independently and follows procedures when obtaining management direction from more senior Pinellas County managers, broker representatives, and other associates when necessary on controversial, unusual, highly complex, unique or unprecedented issues and assignments.

This position is tasked to perform technical and administrative support duties requiring the incumbent to interact with customers and service providers to review, analyze, and apply insurance requirements/coverage, actuarial estimates, budgeting, and allocating costs. The position incumbent interacts with insurance broker representatives, consults with department representatives, produces reports, and serves as the department's technical RM go-to staff to support the RM senior managers efforts to make decisions and in the administration of certificate of insurance matters, regulatory insurance coverage compliance, purchasing/contract RM compliance reviews, and RM related computer data [STARS & Ebix-risk management, property, and casualty insurance technical support services provider] and similar reports. The position incumbent's most highly sensitive, demanding, and complex work is overseen and supervised more closely by a professional supervisor.

Internal analysis and review was completed comparing technical, professional, manager, and administrative classifications currently allocated to RM ranging from Risk Management Support Technician, pay grade CL 13; up to classifications at pay grade CL16, the highest level professional non-supervisory pay grade currently allocated to RM. In addition, consideration was given to position classifications allocated to other departments. Analysis and discussions between HR and RM management took place over a time period extending from the interim Bureau Director, RM, until appointment of the permanent Bureau Director, RM, in September 2011. Now, RM places the responsibility for the professional independent decision making for pre and post contract reviews with a supervisor or manager with this position, providing substantive administrative support to the function. The independent performance of this function is a requirement for the Risk Management Analyst, pay grade CL16 classification. Although broadened, the nature of this position's tasks and the independence required to perform RM tasks falls below the level of the Risk Management Analyst, pay grade CL16 classification. The Bureau Director, RM, or supervisor designee retains responsibility for ongoing professional, independent decision making in matters, such as, authoritatively defining and deciding important and sensitive compliance decisions for liability and insurance related to major contracts and procurements. Unlike this position, a majority of higher level pay grade CL14 or pay grade CL15 classified positions include criterion for lead worker, supervision, licenses, certifications or credentials, and this position has no such requirements. Using internal job comparisons, the position's current duties and responsibilities support the recommendation for the position to remain classified as Risk Management Technician, pay grade CL13.

## RISK MANAGEMENT TECHNICIAN

Job Code	Pay Grade
15828	CL13

### Nature of Work

This is technical and semi-professional work administering, coordinating, and supporting Risk Management programs, operations, and applications in a highly automated environment. Tasks include database maintenance, database enhancement, data transfer, and usage standards and procedures to support any combination of risk management support or technical services in Risk Management programs and services, in any combination of safety or claims operations and functions. Work at this level involves analyzing programs and developing improved policies, practices, methods, and procedures. An incumbent in this class performs technical assignments independently and is responsible for problem solving to transition from older policies, procedures, and technology to more efficient and effective operating procedures. Work requires the incumbent to perform technical assignments independently to include researching and formulating recommendations to department supervisors and managers. Duties may require an understanding of risk management policies combined with automated computer applications, in order to apply and adapt software applications to deliver efficient and effective risk management services. Work requires the exercise of considerable independent judgment, attention to detail, and adherence to rigid deadlines. Incumbent refers non-standard situations, controversial, and complex technical problems to a supervisor with recommended courses of action. The position reports to the Bureau Director, Risk Management, a supervisor or designee.

### Minimum Qualification Requirements

- 4 years in risk management and/or insurance claims administrative and technical support in an automated data systems environment; or
- Associate's degree with major course work in management information, risk management, finance, public administration, business administration, or related field and 2 years experience as described above; or
- An equivalent combination of education, training, and/or experience.

### Appointing Authority May Also Require

- Florida Driver's License or Florida Commercial Driver's License and endorsement, if any.
- Assignment to work a variety of work schedules including compulsory work periods in special, emergency, and/or disaster situations.
- Possess and maintain a State of Florida license in the form of an All Lines Insurance Adjuster.
- Other highly desirable knowledge, skills, abilities, and credentials relevant to a position.

### Illustrative Tasks (These are examples and are not all inclusive.)

- Supports and assists managers, supervisors, and other associates in implementing a broad range of risk management technical and administrative tasks.
- Assists and supports Risk Management Analyst and/or Director in reviewing insurance certificates, gathering renewal information, and performing first review of contractual risk transfer language for final review by Risk Management Analyst or Director.
- Implements risk management policies; performs and coordinates automation efforts, and explains risk management programs, policies, and procedures taking lead responsibilities for assigned risk management tasks and services.
- Conducts in-house systems studies to include areas such as risk management automation and data systems, department policies/procedures, and special projects.
- Acts as user contact point for supporting risk management systems problems; trouble shoots, tests, evaluates, analyzes and makes preliminary determinations regarding network related problems, applications or software problems, and guides users through corrective action steps.
- Designs and develops manual or automated records management systems; reviews existing or potential office information systems and prepares recommendations for changes and improvements.

## RISK MANAGEMENT TECHNICIAN (continued)

Job Code	Pay Grade
15828	CL13

### Illustrative Tasks (continued)

- Evaluates and advises department staff on departmental records management administration, such as, microfilm, fiche, optical scanners, and related assignments.
- Advises management on applications to assist records management operations.
- Develops departmental standards, guidelines and procedures for users of risk management systems including intra-department automated systems and records.
- Performs data processing related duties including using available statistical or packaged software programs, encoding data, data entry and retrieval, and routine computer terminal operations or programming/reprogramming.
- The incumbent performs administrative support to department operations and personnel as well as provides technical advice in establishing, developing, and implementing risk management administrative policies, procedures, and reports related to regular or special assignments.
- Serves as leader or participates on special projects to install department programs and software relating to designated Risk Management Department programs and services.
- Performs special projects related work as assigned or required.
- Performs related work as assigned or required.

### Knowledge, Skills, and Abilities

- Knowledge of automated risk management business operations and procedures.
- Knowledge of basic insurance coverage limits, terms, and conditions used in various public and private sector businesses, procurement, agreements, and contract relationships.
- Knowledge of standard office software applications such as word processing, spreadsheets, email, internet access and data processing.
- Knowledge of database design, data transfer and conversion processes, data formats and properties.
- Knowledge of office automation systems, procedures and methods.
- Skill in using computers with spreadsheet, word processing, database and presentation software and applications.
- Skill in effective written and oral communications, including preparing complex reports, policies and procedures.
- Applies computer applications and software.
- Ability to work independently without close supervision, prioritize daily activities, and coordinate project work.
- Ability to maintain harmonious working relationships with co-workers, agency staff and external contacts, and to work effectively in a professional team environment.
- Ability to conduct research and prepare special reports, correspondence and recommendations, both orally and in writing.

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Revised	EEOC Code	Overtime Code
1/12	Technicians	Classified