NORTH BAY SCHOOLS INSURANCE AUTHORITY

JOB DESCRIPTION

RISK MANAGEMENT SPECIALIST

POSITION	Risk Management Specialist
CLASSIFICATION	Non-exempt
SALARY RANGE	$91,192 - $128,469 ($43.84 - $61.76/hr.) 10-Step Scale
BENEFITS	Benefits accrue based on the full/part-time classification for the position. Benefits include, employee/dependent medical, dental and vision; CalPERS Defined Retirement Benefit Plan; 457 Plan; a group disability plan; Employee Assistance Program (EAP); and paid holidays, vacation, and sick leave. A partial remote-work environment is available.

North Bay Schools Insurance Authority (NBSIA) is a mid-sized school-focused risk pool, serving over 11,000 school district employees and over 77,000 students with 30 employees. We provide our members with high-quality, cost-effective, and innovative protection, programs, and services, so they can focus on what they do best.

NBSIA members and staff are our greatest assets. Our collaborative, team approach, and strong values, are among the reasons NBSIA is known as a premier risk management pool in the state.

Our Values

Member Centered

Risk Management Expertise

Long-term Vision

Innovation and Teamwork

This is a great opportunity to bring your exceptional skills to bear in support of our vision – *Safe and healthy schools, where people are inspired to work and empowered to learn*.

Job specifications are intended to describe the general nature and range of duties performed by employees in this classification. They are not intended to reflect every duty performed within the job.

DEFINITION

Under general supervision of the Risk and Member Services Manager, the Risk Management Specialist supports the development, coordination, implementation, and evaluation of NBSIA risk management and Member service programs. The position works collaboratively with NBSIA staff, Members, brokers, carriers, legal counsel, vendors, and other partners to identify exposures, develop practical loss-prevention resources, coordinate training and services, and assist Members with risk management questions. The Specialist analyzes claims data and exposure information, conducts research and site visits, supports contract and insurance requirement reviews, prepares communications and reports, and performs professional-level project and program coordination requiring sound judgment, initiative, organization, and responsive customer service.

EXAMPLES OF DUTIES

Risk Management Programs and Services

- Assists the Risk and Member Services Manager with planning, coordinating, implementing, and evaluating risk management programs and services designed to prevent or reduce property and liability losses and support Member operations.
- Researches emerging risks, legal and regulatory developments, industry practices, and loss-prevention strategies; summarizes findings and recommends practical resources or response options for Manager review.
- Analyzes claims data, incident, exposure, inspection, and program information to identify trends and opportunities for Member education, targeted outreach, risk control measures, or program improvement.
- Coordinates risk assessments, site visits, consultations, and follow-up activities with Members, carriers, brokers, consultants, legal counsel, and vendors; tracks recommendations and assists with implementation support.
- Conducts or participates in site observations and risk assessments involving Member facilities, operations, activities, and programs; documents observations and prepares clear, practical recommendations for review.
- Assists with designated property and liability risk management initiatives, including carrier inspections, property-related data collection, valuation support, certificate of insurance processes, and other assigned programs.
- Provides professional judgment and research support regarding proposed Member activities, events, contracts, or programs and elevates complex, sensitive, or high-exposure matters to the Manager.
- Coordinates pre-loss legal or consulting services intended to prevent or mitigate potential losses and communicates status, recommendations, and follow-up needs to appropriate parties.
- Assists with the review of contracts, certificates of insurance, indemnification provisions, and insurance requirements using NBSIA-approved guidance; refers legal interpretations, exceptions, and significant concerns to the Manager or designated counsel.
- Maintains organized program files, records, schedules, service requests, follow-up items, and documentation in accordance with NBSIA procedures.

Member Support, Training, and Communications

- Builds and maintains positive working relationships with Member representatives and responds to routine and moderately complex risk management and program questions within assigned authority.
- Serves as a resource to Members by gathering information, researching issues, coordinating internal or external expertise, and providing timely follow-up; refers claims decisions, coverage determinations, legal advice, and other matters outside the position's authority to the appropriate person.
- Assists in assessing Member needs and developing responsive services, tools, templates, guidance, training, and educational resources.
- Coordinates workshops, webinars, meetings, and other educational programs, including scheduling, presenter and vendor coordination, materials, communications, registration support, evaluation, and follow-up.
- Develops and delivers presentations and training on assigned risk management topics for Member and internal audiences, with appropriate technical review and approval.
- Prepares Member Alerts, articles, program communications, website or resource-library content, surveys, summaries, and outreach materials in collaboration with the Manager and other NBSIA staff.
- Supports Member engagement activities by documenting needs and feedback, tracking service requests, and identifying opportunities to improve the Member experience.
- Collaborates across NBSIA departments to connect claims experience, program operations, training, and Member needs with coordinated risk management solutions.

Program Coordination, Analysis, and Administration

- Plans and manages assigned projects from development through completion; establishes timelines, coordinates participants and resources, monitors deliverables, resolves routine issues, and communicates progress and concerns to the Manager.
- Collects, validates, organizes, and analyzes qualitative and quantitative information; develops spreadsheets, dashboards, reports, summaries, and presentations to support program evaluation and management decisions.

- Assists with the development and documentation of program goals, procedures, service standards, forms, templates, and work processes; recommends improvements based on Member feedback, data, and operating experience.
- Coordinates with brokers, carriers, consultants, legal counsel, training providers, and other vendors; monitors assigned deliverables and service commitments and communicates concerns to the Manager.
- Assists with preparation of staff reports, meeting materials, annual program summaries, budget support information, and presentations for the Executive Director, committees, and Board of Directors, as assigned.
- Participates in professional associations, industry committees, peer groups, conferences, and training opportunities; shares relevant information and resources with NBSIA staff and Members.
- Maintains confidentiality and handles sensitive Member, claim, legal, and organizational information with discretion.
- Perform related duties and responsibilities as assigned.
- Regular and reliable attendance is essential.

QUALIFICATIONS

Must exhibit a professional demeanor, integrity, initiative, sound judgment, curiosity, and a strong commitment to service. The successful candidate will be organized, collaborative, proactive, and able to translate technical or complex information into practical guidance and resources for Members. The position requires the ability to build credibility and rapport, manage multiple priorities, conduct thoughtful research and analysis, and work independently while recognizing when consultation, approval, or escalation is appropriate.

Knowledge of:

- Fundamental principles and practices of risk management, loss prevention, property and liability insurance, claims data, and public entity exposures.
- Risk assessment, research, data collection, trend analysis, project coordination, training development, and program evaluation methods.
- General concepts associated with contracts, indemnification, certificates of insurance, insurance requirements, and property and liability coverage; legal interpretation is not required.
- Public agency or school district operations and exposures, and the role of a joint powers authority or self-insurance pool, preferred.
- Professional customer service, Member engagement, facilitation, presentation, and written communication practices.
- Report development, records management, electronic filing systems, and office methods and equipment.
- Microsoft applications and other information systems sufficient to organize projects, analyze data, prepare reports and presentations, maintain records, and communicate effectively.

Required Skills/Abilities:

- Establish and maintain cooperative, service-focused relationships with Members, colleagues, brokers, carriers, consultants, vendors, and other business partners.
- Identify and analyze risks, exposures, trends, and Member needs; gather relevant information; evaluate options; and develop practical, well-supported recommendations.
- Research, learn, interpret, and apply policies, procedures, coverage concepts, industry guidance, and applicable laws or regulations within the scope of assigned responsibilities.
- Plan, organize, and coordinate multiple projects, programs, training events, and service requests while meeting deadlines and maintaining careful follow-through.
- Prepare clear, concise, accurate, and audience-appropriate reports, analyses, correspondence, presentations, training materials, alerts, and other communications.
- Present information confidently and facilitate productive discussions with individuals and groups.
- Exercise discretion and independent judgment, maintain confidentiality, respond appropriately to sensitive matters, and recognize issues requiring escalation.
- Work independently and collaboratively; adapt to changing priorities; use creative and practical problem-solving skills; and contribute positively to cross-departmental work.
- Travel to Member and third-party locations and conduct site observations or program activities as assigned.

- Represent NBSIA in a manner consistent with the policies, practices, procedures, values, and service expectations of the organization.

EDUCATION/EXPERIENCE

Any combination of experience and training that would likely provide the required knowledge and skills is qualifying. A typical way to obtain the required knowledge and skills would be:

Experience: A minimum of three to four years of progressively responsible professional experience in risk management, loss control, claims and data trend analysis, safety, public administration, school district operations, Member or client services, program coordination, or a related field. Experience working with a public entity, educational organization, joint powers authority, or insurance pool is preferred.

Education: A bachelor's degree in risk management, insurance, business, public administration, occupational safety, education, communications, or a related field, or equivalent relevant experience.

LICENSE OR CERTIFICATION REQUIREMENTS

- Valid California Driver's License.
- Associate in Risk Management (ARM), Certified School Risk Manager (CSRM), Associate in General Insurance (AINS), or another relevant professional designation is desirable, but not required.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform these essential job functions.

Environment: Normal office environment. The position requires regular travel to third-party locations for meetings, site visits, special events, training, or conferences. This is a safety-sensitive position. A hybrid environment is available.

Physical: Incumbents require sufficient mobility to work in an office setting, operate office equipment, and travel to field and third-party locations as needed.

Vision: Vision sufficient to read small print, computer screens, photographs, and other documents or media.

APPLICATION PROCESS

North Bay Schools Insurance Authority is an Equal Opportunity Employer.

Please apply for this opportunity by sending your resume and cover letter to HR@nbsia.org.
Position will be available until filled.