State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Director of Large Accounts

Program:
Large Accounts Operations

Work Unit:
Large Accounts

Classification:
Program Manager I, SCIF

Report To:
Program Manager II, SCIF

Collective Bargaining Identifier (CBID):
M01

Fair Labor Standards Act (FLSA) Status:
Not Covered, Exempt. Work Week Group E

Special Requirements

Conflict of Interest Designation: Yes
This position is designated under the State Fund Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may have a material effect on personal financial interests. The selected candidate is required to complete the Statement of Economic Interest—Form 700 within 30 days of appointment and once per year thereafter.

Bilingual Position: Not applicable.

Rotational Assignment: Not applicable.

Program Information:

The Program oversees State Fund's complex and largest underwriting segments, defined as Standard Premium of $500,000 and above. The Program ensures strategic alignment with corporate priorities, drives operational excellence across all underwriting functions, strengthens market presence, and contributes to State Fund's financial stability and long-term competitive position.

Purpose/Scope:

Under the general direction of the Program Manager II, SCIF (Vice President of Middle Market and Large Accounts), the Program Manager I, SCIF manages and support operational leadership of the Large Accounts segment by coordinating workflows, ensuring consistent application of underwriting processes, and executing service standards. This role implements program policies and standards within a defined segment of Large Accounts and contributes to operational readiness and execution, while strategic decisions and program-wide authority remain with the Vice President of Middle Market and Large Accounts. The incumbent will manage the specific dynamics of the underwriting function and deliver short and mid-term goals and objectives related to revenue planning and staff resource management. The incumbent implements and administers account management strategies for Large Accounts and uses specific Key Performance Indicators (KPI's) to assess and manage staff performance. This position provides direction in a manner that recognizes the unique characteristics of Large Accounts while acknowledging common goals for the Organization. The incumbent fosters superior collaboration with all internal business partners to ensure that inter-departmental needs and dependencies are recognized and managed effectively in a mutually beneficial manner. This position is responsible for demonstrating initiative in identifying and recommending operational and tactical opportunities to improve departmental operations and working with related stakeholders to accomplish those improvements.

Essential and Marginal Functions:

In all aspects of performing the following functions the incumbent will:

- Comply with the Code of Conduct
- Maintain regular and predictable attendance and communication availability during working hours
- Establish and maintain effective working relationships and provide quality customer service in a timely manner.
- Follow State Fund's Equal Employment Opportunity principles
- Maintain a safe work environment
- Defend State Fund against fraudulent activities
- Maintain good customer relationships with internal and external business partners and stakeholders
- Properly maintain assigned equipment

This duty statement outlines the primary responsibilities and expected outcomes of the position. It is not intended to provide an exhaustive list of all job duties. Employees may be required to perform additional tasks as assigned, including work in other functional areas.

Description of Duties

35% Essential

1. **Manage the operational areas of the Program to achieve program objectives and industry benchmarks through effective and efficient use of available resources.**
    a. Lead and manage the execution of segment-level program objectives based on State Fund's mission, objectives, values, policies and procedures
    b. Responsible for ensuring strict compliance with all established underwriting guidelines and best practices. Oversee underwriting disciplines, maintaining alignment with corporate policies and regulatory requirements. Provide continuous oversight of underwriting quality, completeness of documentation and adequacy of pricing to consistently achieve or surpass enterprise quality objectives.
    c. Responsible for identifying operational challenges, underwriting hazards and emerging risks that are detrimental to the Program and State Fund, resulting in recommending mitigation plans to the Vice President of Middle Market and Large Accounts and execution of the approved courses of action
    d. Collaborate with the management team and other program managers as needed to implement selected strategies, policies, procedures and technology/system changes.
    e. Provide technical/ professional advice to State Fund management on program-specific issues.
    f. Serve as chair or participate on special projects, committees or task forces to evaluate business challenges/ opportunities and develop solutions and strategies.

30% Essential

2. **Enable the successful performance and development of employees by establishing and communicating expectations and goals.**
    a. Evaluate, develop and coach others to achieve high performance

b. Create, promote and maintain a formal succession planning tool to ensure that State Fund has a qualified candidate pool available for its leadership positions.
c. Develop, implement and maintain Development Plans that are managed against specific goals for all direct reports. Ensure that the plans are implemented effectively. Provide regular coaching and feedback.
d. Conduct timely performance appraisals of all direct reports to encourage, motivate and improve staff performance and to ensure consistency and uniformity in its application in accordance with agency standards.
e. Participate in the recruitment and effective training of new employees. Actively network to seek out new talent to add strength to the organization.
f. Create an environment that empowers and supports others in the change process by establishing and articulating the vision, objectives and expectations.

20% Essential

3. Implement policies and procedures in compliance with legislative, regulatory requirements, and corporate objectives.

a. Responsible for accurate and timely risk evaluation and pricing of new and renewal business.
b. Serve as a referral source for the department on individual account pricing decisions and obtain approval from the Vice President of Middle Market and Large Accounts and EVP, Business Segment Operations for pricing decisions that exceed his/her authority.
c. Ensure that authority/approval protocols are followed by all Program staff.
d. Recommend strategic changes impacting the program and the organization in response to legislative, regulatory and industry changes to meet competitive demands and corporate objectives and values.
e. Promote and practice State Fund's commitment to building business relationships that create and maintain customer service and loyalty.
f. Build partnerships with internal and external stakeholders impacting the program and the organization.
g. Support regional efforts to develop and maintain effective business relationships with key elements of our distribution channel (i.e. brokers).
h. Create an environment that empowers and supports others in the change process by establishing and articulating the vision, objectives and expectations

15% Essential

4. Provide input to non-discretionary budget accounts; Request discretionary budget items and amounts for approval.

a. Ensure that the Program operates within budget and monitor expenditures to ensure sound fiscal control
b. Provide input to the Vice President of Middle Market and Large Accounts of the Program's budget planning process and maintain accurate position control.
c. Monitor, measure and ensure effective and efficient use of budgeted funds.

100%

Required Knowledge Areas:

- Working knowledge of a supervisor's responsibility for promoting Equal Employment Opportunity in hiring and employee development and promotion.

- Proficient knowledge of principles, practices, and techniques of personnel management and supervision to oversee the work activities of staff.
- Proficient knowledge of project management principles.
- Proficient knowledge of workers' compensation insurance rules and regulations.
- Proficient knowledge of the State Fund organization, Regional Office and Corporate functions, and business policies and practices.
- Working knowledge of team building and team-leading skills.
- Advanced leadership and management skills, demonstrating professionalism and integrity.
- Proficient knowledge of general workers' compensation practices, procedures & guidelines, regulations, trends, the California Labor Code, and a broad understanding of critical issues in related areas.
- Proficient pricing skills, demonstrating proficient knowledge of workers' compensation pricing methodologies & techniques, such as loss rating (large risk), guaranteed cost, tiered pricing, and schedule rating.
- Proficient ability to quickly attain technical proficiency in the specific underwriting practices and guidelines of Specialty Coverages.
- Proficient knowledge of workers' compensation pricing methodologies & techniques, such as loss rating (large risk), guaranteed cost, tiered pricing, schedule rating, etc.

Required Skills and Abilities:

- Ability to lead, supervise, direct, train, develop, monitor, motivate, appraise, and discipline staff.
- Ability to analyze workflow issues and distribute/delegate work to staff.
- Ability to design, plan, and implement policies, procedures, and workflow processes.
- Ability to achieve results according to objectives.
- Ability to manage multiple projects and tasks.
- Ability to effectively work with and relate with other people.
- Ability to coordinate, facilitate, and make presentations.
- Ability to handle high pressure situations while being firm but tactful.
- Ability to resolve sensitive issues and problems.
- Ability to communicate professionally and effectively, verbally and in writing, (including the ability to negotiate credibly and persuasively) with a variety of "stakeholders".

Work Environment:

Physical Requirements:

- Computer data entry, frequent positioning of self to move and transport light objects, and telephone work; mobility to various working areas.
- Incumbent works in the usual office environment.

Travel:

- Travel may be required.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.
- Travel to various work sites and locations for training and/or meetings.

Emergency call backs:

- Not applicable.

Work Hours:

- Work hours may vary.
- Will occasionally involve work in the evenings.

Supervisor's Statement: I have discussed the duties of the position with the employee

Supervisor Name (Print):	Supervisor Signature:	Date:

Employee's Statement: I have discussed with my supervisor the duties of the position and have received a copy

Employee Name (Print):	Employee Signature:	Date: