State Compensation Insurance Fund
Duty Statement

Position Information

Employee Name:

Position Title:
Regional Marketing Manager

Program:
Regional Operations

Work Unit:
RO – GBA Region Marketing

Classification:
Manager II, SCIF

Report To:
C.E.A.

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.

Program Information:

The Field Marketing Team establishes and maintain key business relationships with broker business partners to support the submission of business opportunities to State Fund, and at the same time, collaborate with regional management and other internal stakeholders on the underwriting and servicing of accounts.

Purpose/Scope:

Under direction of the C.E.A. (Senior Vice President of Regional Operations), the Manager II, SCIF (Regional Marketing Manager) leads all efforts within the marketing function in order to strengthen business relationships with brokers leading to successful net business results, and at the same time ensure adherence to Regional Office and corporate guidelines and goals, and interact with regional management and other units to meet operational needs.

• Develop, maintain and strengthen business relationships with key stakeholders in brokerages to ensure a positive flow of business to State Fund.
• Work collaboratively with underwriting segments and other departments to continuously deliver and manage a business pipeline to optimize new business placement and high retention results.
• Recruit, select/hire, train/develop qualified and high performing staff. Evaluate and discipline staff as appropriate to maintain a high level of performance.
• Provide and promote professional public relations. Develop and maintain quality customer service and loyalty within

and outside the State Fund.
• Assess/monitor and optimize performance, work flow processes and workload balances.
• Contribute to task force projects on corporate and industry-wide issues.

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. **Develop, maintain and strengthen business relationships with key stakeholders in brokerages to ensure a positive flow of business to State Fund.**
    a. Develop and execute a plan to engage with key focus brokers that drive the highest business outcomes for State Fund.
    b. Establish performance objectives for the marketing function to support our ability to appropriately engage with key stakeholders that drive successful business results.
    c. Effectively implement corporate, regulatory, and legislative changes.
    d. Serve as acting Senior Vice President in the absence of the Senior Vice President.

30% Essential

2. **Work collaboratively with underwriting segments and other departments to continuously deliver and manage a business pipeline to optimize new business placement and high retention results.**

    a. Identify business opportunities by managing a business pipeline, and recognizing and escalating key business opportunities to senior leadership.
    b. Monitor and utilize reports to effectively strategize the type of field engagement needed to effectively increase a new and renewal business pipeline.
    c. Monitor and coach staff on effective business pipeline management.
    d. Collaborate as needed with key stakeholders that impact business results within the organization.

15% Essential

3. **Recruit, select/hire, train/develop qualified and high performing staff. Evaluate and discipline staff as appropriate to maintain a high level of performance.**

    a. Ensure that organization and staffing are used to achieve Budget Plan objectives.
    b. Foster and maintain a work environment free of discrimination and harassment according to corporate guidelines.
    c. Manage recruitment and hiring of subordinate staff.

aa. Collaborate with subordinate supervisors in filling vacancies.
bb. Promote recruitment and selection practices that are fair, impartial and consistent with Equal Employment Opportunity guidelines, State civil service rules, and corporate procedures.

d. Regularly review duty statements of subordinate staff and update as needed. Ensure that revised duty statements are discussed with staff.
e. Ensure that staff develops and maintains the level of expertise required to achieve Budget Plan objectives.
    i. Identify and meet staff training and development needs within budget parameters.
    ii. Promote and monitor staff professional development and State Fund "business literary" through functional cross-training, assignment to corporate and program (team) projects, and participation in classes, seminars and professional organizations, as appropriate.
f. Appraise and discipline subordinate staff.
    i. Provide timely probationary and annual appraisals.
    ii. Provide and demonstrate positive leadership aptitude.
    iii. Provide guidance to assist subordinate supervisors with feedback, training and discipline as appropriate to improve staff performance and correct performance deficiencies. Keep Vice President apprised.
    iv. Provide continuous coaching, mentoring, and leadership development to subordinate staff.
g. Respond to grievances and complaints as needed.
h. Ensure personnel safety.
    i. Maintain safe working conditions and procedures according to corporate safety guidelines.
    ii. Take immediate, appropriate action when notified of any unsafe condition, potential threat to employee safety and health, ergonomic need, or request for reasonable accommodation.
    iii. Report work injuries or accidents immediately. Ensure that all reporting forms are completed in compliance with corporate guidelines.
    iv. Ensure that assigned and unit equipment is operated in a safe manner and maintained in good working order.
i. Ensure that appropriate tools and working environment are provided to ensure efficient and safe operations.
j. Monitor overtime usage.

15% Essential

4. Provide and promote professional public relations. Develop and maintain quality customer service and loyalty within and outside the State Fund.

a. Promote proactive account management and contribute to Regional Office effectiveness in providing and promoting prompt, quality service.
b. Provide clear, concise and timely communication to internal and external customers regarding (changes in) service, policy or programs.
    i. Participate in meetings with policyholders/brokers as needed.
    ii. Communicate with and respond to inquiries from policyholders/brokers and the workers' compensation community.
c. Respond to complaints, audits and inquiries as needed.
d. Communicate with Regional Office management team on matters that will impact their area of responsibility.

5% Marginal

5. Contribute to task force projects on corporate and industry-wide issues.

a. Manage, coordinate and complete special projects as requested.
b. Participate in corporate projects and committees.

100%

Required Knowledge Areas:

- Proficient knowledge of workers' compensation laws and regulations and the California Labor Code.
- Proficient knowledge of State Fund underwriting and marketing advisories, policies, and procedures.
- Proficient knowledge of the broker community and broker trends as they affect the Regional Office.
- Proficient knowledge of various State Fund functions as they impact Policy Operations.
- Proficient knowledge of effective change management principles and strategies in organizations.
- Proficient knowledge of State Fund standard software applications.
- Proficient knowledge of project management, organizational and team-building principles.
- Proficient knowledge of time management techniques to oversee efficient prioritization and completion of work unit tasks for staff and self.
- Proficient knowledge of the technical key elements in underwriting an insurance policy.
- Proficient knowledge of Loss Rating tools and techniques to properly evaluate a business risk.
- Proficient knowledge of principles, practices, and techniques of personnel management and supervision to oversee the work activities of staff.
- Working knowledge of current management's responsibility for promoting Equal Employment Opportunity in hiring, employee development and promotion.

Required Skills and Abilities:

- Ability to lead, supervise, coach, coordinate, direct, train, develop, monitor, motivate, appraise, and discipline staff.
- Ability to design, plan, and implement policies, procedures, and workflow processes.
- Ability to achieve results according to Budget Plan goals and objectives.
- Ability to influence others and negotiate agreements and consensus among project partners, work peers, and other stakeholders.
- Ability to effectively develop and maintain harmonious working relationships with diverse groups of people.
- Ability to evaluate information and analyze data correctly to support and defend decisions and recommendations.
- Ability to coordinate, facilitate, and make presentations.
- Ability to develop, provide, and monitor training.
- Ability to manage and prioritize multiple projects and tasks and delegate when needed.
- Ability to handle high pressure situations while being firm but tactful.
- Ability to resolve sensitive issues and problems.
- Ability to promote State Fund and our service.
- Ability to write professional and accurate reports and other communications suitable for distribution to internal and external customers.
- 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:

- Frequent business travel.
- Travel conditions may include urban and/or rural areas and could involve traversing uneven surfaces or ascending stairs.
- Travel may include, but not be limited to, plane, bus, van, taxi, or car.

Emergency call backs:

- Emergency call backs may be needed.

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: