



## **Job Description: Director of Client Services**

October 1, 2018

Pay Range: \$62,292 - \$98,374

### Position Summary

The Director of Client Services is mainly responsible for the organization and completion of various tasks, projects and OTRP engages in with its contracted clients. Support for OTRP in project management or other duties will also be expected. The Director of Client Services maintains professional relationships with OTRP members, staff, OTRP service providers and the Transit Industry as a whole to provide effective administration of the OTRP Member Services program. The Director of Client Services reports directly to the CEO.

### Position Requirements

The Director of Client Services shall, at a minimum, have a Bachelor's Degree and/or equivalent work experience.

The Director of Client Services shall have the ability to:

- Communicate verbally and in writing.
- Act in a self-directed and independent manner.
- Legally operate a motor vehicle.
- Physically navigate member Transit Properties.
- Travel as required
- Occasionally lift up to 40 pounds (paper, office supplies, etc.)
- Learn PC's and software applications including word processing, financial management/accounting, spreadsheets, databases, claims information systems, desktop publishing, e-mail, etc.
- Learn general corporate finance and accounting practices
- Understand office terminology, practices, procedures and equipment.
- Coordinate and develop presentations and conduct training and marketing sessions on job specific topics.

The Director of Client Services is expected to work weekdays between 8 AM and 5 PM. The Director of Client Services will spend approximately 70% of their time in an office environment with the additional 30% divided between walking/navigating, standing, operating a motor vehicle, attending meetings, or doing client member meetings off-site. The Director of Client Services must be able to remain stationary for long periods of time; occasionally move about the inside of an office to access filing cabinets, office machinery, and other tasks; constantly operate a computer and other office machinery; share accurate information with clients, vendors and co-workers both in person and electronically; and occasionally work in outdoor weather conditions. A flexible work schedule may be permitted, subject to the approval of the CEO, provided it can be consistently maintained and meets the needs of OTRP. Requirements to work in excess

of a 40-hour workweek will be rare but may include extra hours on weekdays or weekends as circumstances require.

The Director of Client Services shall be knowledgeable (or have the ability to become knowledgeable) in the following areas:

- Public transit operations
- Standard insurance coverage structures and insurance industry trends
- Program ratings
- Actuarial analysis interpretations
- Reinsurance/Excess/Stop Loss Contract Provisions
- Budget and general finance
- Project management (planning, budgeting, implementing, reporting)
- Public speaking skills
- Drafting skills for marketing or press releases
- Procurement
- Microsoft Excel/PowerPoint/Word

#### Specific Duties and Responsibilities

1. Confers with company officials to plan and develop methods and procedures to increase membership and obtain greater efficiency.
2. Assists in the development of wellness plans and wellness systems
3. Reviews coverage books, excess forms, health and life certificates and other binding coverage certificates in conjunction with legal counsel and management.
4. Coordinates all renewal processes and application forms/processes.
5. Collects and manages underwriting data for health including retention of experts, systems integration of databases and training for members of requirements.
6. Provides the renewal information to carriers, brokers and management each year as requested.
7. Controls a renewal calendar which is efficient for the specific client
8. Assists in the preparation of budgets for client members.
9. Assists in the analysis of the actuarial report in relation to program rating.
10. Provides member transit systems with information relating to board policies and procedures and answers routine inquiries relating to rating, data, coverage and insurance.
11. Oversees invoicing process in conjunction with OTRP Staff
12. Oversees vendors as part of clients served
13. Presents information to clients and potential clients regarding detailed information for the OTRP clients served.
14. Acts as client spokesperson when required. Writes press releases and other documentation.
15. Manages social media and web presence
16. Assists or runs procurement processes or RFP's
17. Assists or writes for grants
18. Oversees grant management
19. Assists the CEO with any audit process when required
20. Supports and works towards client strategic objectives and work plans.
21. Other duties as assigned by the CEO