



## RISK MANAGEMENT ASSOCIATE I, II, III

### **BASIC FUNCTION**

Under general supervision, perform a variety of general-to-specialized duties implementing the District's worker's compensation, property, auto and liability insurance claims programs; participate in identifying, evaluating and protecting the physical, financial and human assets of Portland Public Schools; participate in and review school and departmental safety and loss control procedures to avoid and prevent claims; develop and deliver trainings and materials to increase safety awareness and best practices designed to promote and encourage a safe and productive work and learning environment.

### **REPRESENTATIVE DUTIES**

*The classification specification does not describe all duties performed by all incumbents within the class. This summary provides examples of typical tasks performed in this classification.*

- Review, track, monitor and oversee a variety of routine-to-unique worker's compensation, property, auto and liability insurance claims; serve as a point-of-contact and liaison with insurers, legal counsel and other interested parties; monitor and communicate ongoing litigation, expenses and claims' status to leadership, as directed. "E"
- Assist with and perform the processes involved in worker's compensation, property damage and theft loss claims; interpret and explain rules, regulations, policies and procedures that pertain to claims; review various claims and forms, determine timelines and claimant eligibility, establish case files and advise concerned parties regarding status of claims. "E"
- Analyze worker's compensation, property, auto and liability claim requests, forms, reports, and related documents submitted for District consideration and action; request additional information, research and report on discrepancies. "E"
- Maintain employee, student injury and accident reports; perform analyses of accident and injury data, identify and report on findings, trends, potential vulnerabilities and develop appropriate recommendations to reduce or eliminate risk. "E"
- Participate in and/or lead implementation and monitoring of District strategies to prevent and minimize liabilities and loss including return-to-work programs, safety committee participation and leadership, the development and delivery of safety programs and compliance with local, State and federal laws and regulations. "E"
- Participate in and/or lead oversight and implementation of the processes, policies and procedures related to student transportation in school buses, District-provided and personal vehicles; maintain databases and records regarding approved drivers, licensures, insurance coverages, vehicular travel authorizations, vehicular accidents, student, employee and members-of-the-public injuries; regularly report and follow up on activities' status, compliance issues, concerns and related findings. "E"
- Review and evaluate work-related accident reports for completeness and clarity of data and to ensure compliance with policy and regulatory requirements; assist in investigation of individual claims for eligibility for workers' compensation benefits as assigned; work with third party administrator, District management, Human Resources, Finance, District Legal Services and others to comply with legal

and procedural requirements for the processing of claims ensure proper and timely payment to employees and medical facilities. “E”

- Collaborate with and serve as a liaison with administrative departments such as Human Resources, Facilities and Asset Management Security, Legal Services and Finance in order to provide an integrated service and support model for staff, student and public safety and liability issues and claims. “E”
- Participate in the evaluation and evaluate current and proposed legislation on the local, State and federal levels that may impact the District’s obligations or liabilities; prepare analyses and present appropriate recommendations to management as appropriate. “E”
- Receive, process, update and file certificates of insurance for professional services or facilities services contracts. “E”
- Develop, complete and prepare a variety of in-house, third party administrator, insurance company, local, State and federal agency reports, including development of graphics, tables, and charts for risk management and safety functions. “E”
- Prepare a variety of claim forms for and process receipts and invoices for timely payment of claims; track, monitor, recommend and authorize payments for services provided by physicians, investigators, attorneys, patrol agencies, and other vendors and contractors; monitor and update property, vehicle and equipment valuation schedules to ensure adequate and appropriate insurance coverage; submit renewal data and ensure timely payment of insurance renewal invoices. “E”
- Respond to subpoenas and restitution requests; represent the District in civil and criminal trials, mediations, and other matters as they relate to property, auto and liability claims, as appropriate. “E”
- Maintain current knowledge and expertise regarding laws, rules, policies and procedures governing public agency worker’s compensation, return-to-work programs, auto, property and liability claims administration; participate in meetings, in-service training, and workshops to gather information required to perform assigned job functions. “E”
- Demonstrate a commitment to the Portland Public Schools Equity Initiative by developing a thorough knowledge and application of the district Racial Educational Equity Policy, Equity in Public Purchasing and Contracting and other board policies; participate in staff development, in-services and trainings related to diversity, equity and inclusion in the workplace and in K – 12 education; model appropriate behaviors; develop, recommend and implement improvements to business practices with awareness and understanding of their impact in a racially and culturally diverse community. “E”
- May provide training, work direction and guidance to designated staff as appropriate.
- Perform related duties as assigned.

*Note: At the end of some of the duty statements there is an italicized “E”, which identifies essential duties required of the classification. This is strictly for use in compliance with the Americans with Disabilities Act.*

## **DISTINGUISHING CHARACTERISTICS OF THE CLASS**

All levels of the Risk Management Associate classification series participate in the review, tracking, monitoring and oversight of the processes and procedures essential to implementing the District’s comprehensive worker’s compensation, property, auto and liability insurance claims programs.

The Risk Management Associate I is the entry-level classification in the series. Employees perform the most basic, routine, repetitive activities within the various areas of claim processing, while developing the skills, knowledge and expertise to perform the full-scope of duties within the District’s worker’s compensation, property, auto and liability insurance claims programs.

The Risk Management Associate II is the professional-level classification in the series. Employees at this level apply detailed knowledge of local, State and federal laws, District rules, policies and procedures in performing the full-scope of duties within the District’s worker’s compensation, property, auto and liability insurance claims programs. Employees in this classification conduct a variety of analyses related to assigned functions, preparing reports and recommendations for management consideration. As subject

matter experts, employees serve on District committees and cross-functional teams to collaborate on ensuring best-practices in process implementation and develop and deliver related trainings.

The Risk Management Associate III is the advanced-level classification in the series. Employees at this level apply detailed knowledge of local, State and federal laws, District rules, policies and procedures in performing the most difficult and complex of duties within the District's worker's compensation, property, auto and liability insurance claims programs. Employees in this classification conduct a variety of analyses related to a wide variety of risk management functions, preparing reports and recommendations for mitigating risk and liability. As subject matter experts, employees at this level serve on and lead District committees and cross-functional teams, ensuring best-practices in process implementation development and delivery of safety and risk mitigation training. Employees are typically the first designee called upon to represent the District in litigation and court proceedings and are expected to provide leadership, training, work direction and guidance to designated staff.

## **EMPLOYMENT STANDARDS**

### Knowledge of:

Local, State and federal laws related to worker's compensation laws, public agency risk and liability. Methods, practices, timelines, terminology and procedures used in worker's compensation administration, property, liability and automobile claims processing.  
Oregon Occupational Safety and Health Division (OSHA) regulations  
Computer software such as database, word processing, presentation and spreadsheet applications.  
Effective written and oral communication techniques.  
Techniques and principles of high-quality customer service.

### Ability to:

Learn and perform the functions of public agency risk management, including worker's compensation, liability, auto and property claims management by applying district, local, State and federal laws, rules, policies and regulations.  
Learn, understand, interpret, apply and explain district and department rules, policies and procedures related to risk management programs and activities.  
Perform basic-to-advanced services for the District's worker's compensation, risk and liability programs, as designated by level.  
Advocate, model and implement Portland Public School's Racial Educational Equity Initiative and board policies.  
Learn and implement PPS Equity in Public Purchasing and Contracting board policy and related procedures.  
Serve on and/or lead cross-functional teams, meetings and trainings related to risk management programs.  
Maintain accurate records and compile and write clear and concise reports.  
Learn and develop expertise in performing duties through a variety of specialized risk management software programs.  
Provide effective customer service, exercising discretion, tact and diplomacy.  
Establish and maintain effective relationships with those contacted in the course of work.  
Meet deadlines and schedules, while adapting to changing work priorities.  
Demonstrate and model highly ethical standards in the performance of assigned duties.  
Develop the skills and ability to and provide training, work direction and guidance to designated staff as appropriate.  
Work independently with minimal supervision.  
Communicate effectively both orally and in writing.  
Operate a variety of office machines, technologies and software.

**Education, Training and Experience:**

The Risk Management Associate I requires one (1) year of general experience in such areas as processing insurance claims, conducting light duty/return to work activities, safety training, loss control prevention and/or inspections, or similar activities; or one (1) year of experience as an Accounting Specialist with the Portland Public Schools.

The Risk Management Associate II requires certification from the Risk Management for Public Entities, Oregon PRIMA or similar certificate of completion from a recognized Risk Management program and three (3) years of experience performing the full-scope of duties in processing claims for worker’s compensation, property, auto, and liability, or certification from the Risk Management for Public Entities, Oregon PRIMA, or similar certificate of completion from a recognized Risk Management program and two (2) years of experience as a Risk Management Claims Specialist I with the Portland Public Schools.

The Risk Management Associate III requires certification from the Risk Management for Public Entities, Oregon PRIMA or similar certificate of completion from a recognized Risk Management program and five (5) years of experience performing the full-scope of duties in processing claims for worker’s compensation, property, auto, and liability, including representing the employer as subject matter expert in legal proceedings, developing and conducting risk analyses and trainings and providing work direction and guidance to designated staff.

**WORKING CONDITIONS**

*The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Persons with certain disabilities may be capable of performing the essential duties of this class with or without reasonable accommodation, depending on the nature of the disability.*

**Work Environment:** Work is typically performed in a business office environment.

**Hazards:** Potential conflict situations.

**Physical Demands:** Primary functions require sufficient physical ability and mobility to work in an office; dexterity of hands and fingers to operate a computer keyboard and other technologies and office equipment; sitting, standing and walking for extended periods of time; kneeling, bending at the waist; lifting, pushing, pulling and carrying equipment, supplies and materials weighing up to 25 pounds; repetitive hand movement and fine coordination to use a computer keyboard; hearing and speaking to exchange information in person or on the telephone; seeing to read, prepare and assure the accuracy of documents.

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FLSA: RMA I - Non-Exempt; RMA II – Non-Exempt; RMA III - Exempt  
Bargaining Unit: N/A  
Salary Grade: RMA I – 13; RMA II – 22; RMA III - 27

Approval Date: December 6, 2016

*Portland Public Schools recognizes the diversity and worth of all individuals and groups and their roles in society. The District is committed to equal opportunity and nondiscrimination in all its educational and employment activities. The District prohibits discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.*

*Board of Education Policy 1.80.020-P*