



Deputy Director

Reports to: **Executive Director**

Status: **Exempt, Salary**

JOB SUMMARY:

This position manages the complete scope of fiscal operations for the Pool. Manages all aspects of data management, collection, and analysis for usage in underwriting, risk management and claims management. Supports the Executive Director with administrative, operational and governance of the Pool. The position is relied upon to innovate, collaborate, and lead change initiatives that improve organizational effectiveness and efficiency. The Deputy Director provides on-site visitation and engagement to WSTIP members on various topics including how WSTIP underwrites and rates the members, available programs and services, and WSTIP strategies and policies. The Deputy Director supervises the Senior Accountant and Accounting Specialist.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Duties may include, but are not limited to, the following:

1. Support the Executive Director to successfully manage and operate the Pool within its Board adopted policies and state regulatory requirements.

Finance

1. Manage complete scope of fiscal operations including accounting, payroll, monthly and annual reports, administration of claims expense funds and reconciliations, budget development, assess staffing needs, and staff supervision. Ensure adequate financial controls and safeguards. Sign checks for accounts payable and claims as designated.
2. Work cooperatively with the Thurston County Treasurer's Office, the Office of the State Treasurer and WSTIP's elected Board Treasurer.
3. Prepare annual report to the State Risk Manager's Office and respond to questions regarding the same.
4. Coordinate audits with State Risk Manager's Office and State Auditor's Office. Act as audit liaison for financial and accountability audits. Report audit results to Audit Committee, Executive Committee, and Board of Directors.
5. Oversee the development and production of the Pool's *Annual Report*.
6. Prepare annual report on target financial ratios in accordance with Target Financial Ratio policy.

Underwriting

1. Oversee and manage all aspects of data management, collection, and analysis for usage in underwriting, risk management and claims management. This will include ensuring appraisals are completed timely.
2. Oversee and manage all aspects of actuarial report data collection and analysis. Help Members understand the impacts of rating and provide rate sheet education. Prepare the annual Prior Period Assessment Audit.
3. Analyze loss data by agency and as a group for the purpose of identifying significant areas of risk exposure. Work cooperatively with the Member Services Manager to identify programs to reduce risk.



Administration & Operations

1. Serve as WSTIP's contract management officer including review and reporting.
2. Manage WSTIP's contract for external IT Service/Support (excluding the Origami Risk). Work with department managers to determine needs and make recommendations for improvements. Work to support redundancy for business continuity purposes.
3. Manage WSTIP's phone system.
4. Manage electronic records retention/disposition in compliance with Washington State retention schedules.
5. Perform reviews of compliance with WSTIP's Scan & Toss policy. Make recommendations for changes to the policy to remain compliant with legislative changes and best practices. Provide staff training on policy.
6. Perform annual reviews of the Business Continuity Plan and make recommendations for improvements to the plan. Ensure the plan has a full review every three years.
7. Lead the collection, filtering, warehousing and analysis of pool datasets (excluding Origami Risk). Work with department managers to provide trend analysis that supports the efficient utilization of pool resources.
8. Lead technology initiatives and AI-driven innovations to solve complex business challenges and to help the Pool increase its capacity to provide for its Members and to reduce risk for WSTIP and Pool Members.
9. Assist the Executive Director with procurement, human resources and broker purchased insurance.
10. Assist the Executive Director with reviewing content prepared for governance meetings.

Governance

1. Oversee and provide for the development of Board Member training programs, work with the Board Development Committee and Staff to identify content and to find innovative ways to provide training.
2. Working with department managers, develop content for governance meetings and assigned WSTIP Committee meetings.
3. Working with department managers, oversee and provide for the development of digital content for Governance meetings (e.g. audio or visual content).
4. Visit with Members and provide them with opportunities to share what they are doing, where/how we can help with risk management or mitigation efforts, and where/how we can support them in their Governance roles.
5. Prepare WSTIP's AGRiP Advisory Standards Application.

General Duties

1. Assist other departments with review of complex member activities.
2. Manage all aspects of assigned special project activities including concept development to operate in cooperation and communication with staff, members, vendors, and other stakeholders.
3. Supervise and develop assigned staff through periodic goals and objectives, orientation, training, coaching, discipline (including recommendations for termination), and performance reviews.
4. Stay abreast of new and updated laws and regulations. Analyze and inform Members of the impact on their activities. Assist in identifying resources to ensure each member can meet the requirements of new laws.
5. Attend staff meetings, training, conferences and seminars as requested.
6. Provide support to the Executive Director, Executive Committee, Board of Directors and WSTIP committees.
7. Represent WSTIP on external committees, as assigned (e.g. WSTA committees).
8. Support succession and business continuity planning efforts. This includes providing training to other employees designated to provide secondary support to critical aspects of your position.
9. Perform other duties as assigned.



SOFTWARE AND SYSTEMS:

- QuickBooks (accounting software)
- US Bank SinglePoint (AP P-Cards/credit cards)
- KeyBank Navigator (banking)
- Origami Risk (Risk Management Information System)
- Authorize.net (AR credit card processing)
- Fyle (expense reimbursement software)
- Microsoft Office Suite including Word, Excel, Outlook, PowerPoint
- Adobe Acrobat Pro, Adobe Sign, Docusign

STANDARDS OF PERFORMANCE:

- Actively support and incorporate WSTIP's vision, mission, core values and strategic priorities into daily activities.
- Work cooperatively with department managers, the Executive Director and Pool Members.
- Report to work as scheduled or as communicated.
- Maintain confidentiality of all information related to Members, Staff and other information as appropriate.
- Demonstrate positive interpersonal relations in dealing with fellow employees, WSTIP members, WSTA employees, vendors, and external stakeholders so that productivity and positive relations are maximized.
- Identify and work cooperatively with internal and external stakeholders on projects and communicate information and decisions through written communication and presentations.
- Strive to stay up to date through ongoing training, networking, and regular reviews of current relevant trade journals. This includes maintaining Certified Public Accountant (CPA) license or Certified Government Financial Manager (CGFM) professional certification (if applicable).

KNOWLEDGE, SKILLS AND ABILITIES:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Knowledge of:

- Generally Acceptable Accounting Principles (GAAP).
- Government Accounting Standards Board requirements (GASB).
- Data warehouses. Design, develop, and maintain databases and data warehouses, including creating tables, queries, forms, and reports.
- AI tools and prompt writing.
- IT infrastructure and administrative functions to be able to interact with and manage external IT vendors.
- Insurance terminology (intermediate level).
- Legal and contract terminology (intermediate level).
- Spelling, grammar, and punctuation.
- Federal, state, and local laws as applied to personnel and labor.



Ability to:

- Conduct research by evaluating facts and circumstances to regulation or standards, identifying applicability of regulations and standards to the facts and circumstances, drawing conclusions and making recommendations in a formal written process.
- Understand, interpret, explain, and apply Federal and State laws and regulations as well as Agency policies and procedures related to assigned area.
- Read and understand bookkeeping, accounting, and financial documents.
- Make arithmetical computations and tabulations.
- Work independently with limited supervision.
- Plan and organize work in an efficient, cost-effective and results-focused manner.
- Work well under pressure and in high stress situations.
- Quickly switch from one task to another.
- Establish and maintain moderately complex records and reports.
- Establish and maintain effective and cooperative working relationships with members, outside consultants, service providers, vendors, and the public.
- Perform work accurately with strict attention to detail.
- Manage multiple projects and priorities within appropriate deadlines.
- Communicate effectively, oral and written, including effective presentation skills.
- Analyze statistical and other data and make conclusions which produce effective risk analysis.
- Interact favorably with people and work effectively in a team environment.
- Learn and practice appropriate network security principles.
- Manage and facilitate virtual meetings, as necessary.
- Manage, develop and evaluate employees to achieve results while working in hybrid/remote environments.
- Travel to accident locations, meetings, conferences, and seminars on occasion (including overnight stays) on a regular basis. Public transportation won't be sufficient for a WSTIP employee in one region of the state to get to the other regions of the state where our Members are. Public transit as an interconnected option for transportation between regions of the state isn't possible. As such, the employee hired for this position will need to have and maintain a driver's license such that they can drive their own car or drive a rental car as part of performing essential duties, responsibilities of this position.

Experience:

- Required: Experience as the accounting/finance department head responsible for overseeing the department's daily operations, ensuring financial records are accurate and compliant, while supervising and developing staff. Also, four years of progressive experience performing similar professional level accounting functions (e.g. bookkeeping, accounts payable, accounts receivable, expense reimbursements, banking including bank reconciliations, asset and liability reconciliations, payroll and budget practices, preparing financial statements).
- Intermediate experience with QuickBooks accounting software. (Experience with other accounting software programs will be accepted).
- Intermediate experience with Microsoft suite of products including Word, Outlook and PowerPoint.
- Expert experience with Microsoft Excel and an ability to create/use spreadsheets, tables, pivot tables, charts, graphs, dashboards and the ability to interpret data to find trends and patterns that inform business decisions.
- Intermediate experience with Adobe Acrobat Pro.



- Demonstrated ability to coordinate daily activities to meet schedules and complete assigned tasks.
- Desired: experience working in the public sector.
- Desired: familiarity with pooling.
- Desired: familiarity with insurance industry terminology.
- Desired: experience managing projects.
- Desired: experience researching and writing compelling, fact-based narratives to support decision making.
- Desired: experience with large datasets and complex information to identify key trends and issues.

Education:

- Required: Bachelor's degree in accounting, finance, business administration, or related field and five years related experience, or an equivalent combination of education and experience to successfully perform the essential duties of the job such as those listed above.

License and Certification:

- Required: Possession of a valid Washington State driver's license.
- Desired: QuickBooks Online Certification.
- Preferred: Certified Public Accountant (CPA) license or Certified Government Financial Manager (CGFM) professional certification.

WORKING CONDITIONS/PHYSICAL DEMANDS:

Work is generally performed in a fast-paced office environment with frequent interruptions. Frequent travel required throughout the state to various transit systems and training. Ability to maintain flexible working hours at times, especially when traveling. Must be able to effectively utilize personal computers and related software.

Strength: Lifting and carrying general office supplies and files; typically weighing less than 25 pounds.

Manual Dexterity: Ability to consistently perform moderately difficult manipulative skills such as typing and word processing.

Mobility: Ability to climb ladders, stairs, ramps, stoop, kneel, crouch, reach and move around in crawl spaces and areas with low ceilings while making on-site physical risk control inspections. Ability to walk at least ½ mile on variety of surfaces. Ability to sit for extended periods of time.

Visual Discrimination: Ability to consistently identify objects and persons at a distance; read fine print on records and forms.

Hearing: Ability to consistently distinguish normal sounds with some background noise; multiple sounds in a stimulated environment; and verbal language and tones on the telephone.

Speech: Ability to speak clearly and make oneself understood in a one-on-one basis with individuals and in group settings.

The statements contained herein reflect general details as necessary to describe the principal functions of this job, the level of knowledge and skill typically required and the scope of responsibility but should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned including work in other functional areas to cover absences or relief, to equalize peak work periods or otherwise to balance the workload. Furthermore, they do not establish a contract for employment and are subject to change at the discretion of the employer.