

UAIIA Position Description

Position Title: Executive Director

General Description: This position is responsible for providing the administrative leadership for the association. It is a business management function operating with established policies. The Executive Director should assist and guide the Executive Committee, the Board of Directors and the various state committees in the fulfillment of their respective goals. Should advise and assist members of the associations as they strive to operate their independent agencies. Should serve as a liaison between associate members and agency members and encourage networking opportunities and greater working relations. The Executive Director should promote UAIIA products and services to members, nonmembers, consumers and government entities at every opportunity.

Membership: Should take every opportunity to solicit members and nonmembers for renewal and new memberships in UAIIA. This would include associate memberships. Is responsible for working with the Board in setting membership fees and billing structure and is ultimately responsible to follow up with unpaid members personally or by telephone for solicitation. Should review agency offices and yellow pages for logo violations and take action against those who use the logo improperly.

Advocacy: Is responsible to work with the Board and Legislative Committee on legislative and regulatory matters. Form working relationships with legislators and insurance department personnel and work closely with them on insurance related matters that affect independent insurance agents. To monitor legislative bills, organize grass roots efforts, lobby appropriate parties and testify at regulatory and legislative committee hearings on UAIIA's positions. To keep track of important legislative races and make recommendations on political contributions to the Board. Take part in meeting with legislators in delivering PAC checks and discussing our position on legislative and regulatory matters. File the three required PAC reports to the Lt. Governor each election year and maintain lobbying license through that department. On a national level, the Executive Director should write letters to our Congressmen and Senators on vital issues and visit with them at the Legislative Conference and at home when the opportunity arises. Communicate to our membership regularly in writing and verbally on government affairs issues.

Education: Review instructors and materials for UAIIA CE courses. Work with Administrative Assistant to contact instructors for classes and negotiate fees. Help with CE form design and distribution to our membership. Negotiate and work with hotels for our CE classes.

Communications: Read and evaluate incoming mail from companies, agencies, trade-press, and sister associations for meaningful items that should be communicated to our membership. Write and format the "Independent Agent" newsletter on the computer so it is camera ready and help prepare it for distribution to our membership. Format and email

the electronic version of the newsletter. Evaluate products and services from our national association and promote these products to our membership. Write letters or respond verbally to members on their needs and inquiries. Serve as a liaison between our members, the Utah State Insurance Department, the Marketing Association and our National Association. Inform the media on positions of our association and educate them on insurance matters in general.

Insurance Operations: Oversea our E&O Agency. Work with our E&O marketer to solicit members to write their E&O, EPL, and Umbrella programs and encourage members to sell EPL, RLI and HCIT business. Accept applications for insurance. Review, underwrite and submit these applications to our various E&O markets in order to build our book of business. Review our loss ratios and annual E&O production goals. Maintain a trust account, collect premiums, and reconcile the account for those companies not on direct bill. Nearly all phases of running an \$800,000 insurance agency are practiced. Keep all of our state licenses in force and up to date.

Accounting: Be responsible for the accounting of the office in working with UAIIA's Treasurer in providing a financial report for the Board of Directors. Reconcile the account and monitor all the investment accounts. Work with our investment advisor on the mutual funds investments. Review bills and approve payments of less than \$1500. Prepare all of the quarterly taxes and other taxes required by the government. Work with our accountant on the annual income tax and audit of our association.

Board and Executive Committee Meetings: Follow up on association business, organize the board and Executive Committee meetings and coordinate with the President on a working agenda. Prepare minutes of these meetings and distribute them to members of the board. Keep the President apprised of changes in the industry and ongoing operations of the association office.

Travel: Travel is required three to four times a year for 3 to 5 days, usually over a weekend to attend national association meetings.

Other Skills: The ability to write newsletters and other correspondence along with speaking in front of groups is important. This is a roll up your sleeves and pitch in job due to the association's small staff. This person must be able to juggle many responsibilities at the same time while organizing and prioritizing what is most important.

Computer Skills: Understanding how a website is organized and knowing Microsoft Front Page and/or HTML is a plus.

Convention: Work with the Convention Chairman, Committee and Administrative Assistant on our annual convention for speakers, entertainment, and overall organization of the convention. Work with staff on the promotion and detailed (many details are involved) organization of all phases of the annual convention.

Oversee Scholarship Committee: Serve on the scholarship committee. Review applications, interview and help in selecting the scholarship recipients.

Past Presidents Party: Make sure we offer a Past Presidents event each year for those who have served us in the past.

Manual sales: Assist in the many telephone calls and in person sales of insurance manuals.

Office Maintenance: Help in maintenance of equipment, cleaning and janitorial of office.

Oversee all operations of the association and coordinate with appropriate state volunteer leadership to keep our association valuable as a resource for our members and as an overall good organization for the Utah State insurance community.