

**SAN DIEGO COUNTY OFFICE OF EDUCATION  
Personnel Commission**

**CLASS TITLE:** Property and Liability Technician

**DEFINITION:** Acts as a service representative to member school districts; analyzes and adjusts school district claims relative to loss of insured property; maintains the JPA property valuation database; assists in the development and implementation of the Property and Liability JPA and the Safety Surplus Access Program; maintains fiscal responsibility for the Property and Liability and Miscellaneous Property JPA's; plans, organizes and coordinates general office procedures for support staff; assists and leads the work of clerical staff

**REPRESENTATIVE DUTIES:**

**ESSENTIAL FUNCTIONS:**

Upon notification of new member districts in the Property and Liability and Miscellaneous Property Programs, visits the district and trains staff in operating the program under the JPA;

Analyzes and adjusts claims relative to loss of districts' insured property covered under the Property and Liability and Miscellaneous Property Programs: collects claim forms substantiating loss, determines that a covered loss has occurred and the amount of the loss, collects deductibles relating to property and liability losses, determines amount of reimbursement based on replacement cost or actual cash value, and arranges for payment

Determines insurable value of district property based on occupancy and use;

Maintains the JPA property valuation database of all insured district school sites, and adjusts for inflation annually;

Assists in the development of application forms and provides information to districts regarding the Safety Credit Program;

Conducts monthly reconciliation of all related financial statements;

Monitors and assists in the preparation of annual budgets for the Property and Liability and Miscellaneous Property JPA's;

Maintains fiscal accountability between claim's payer, the bank and the JPA Administrator;

Maintains and reconciles the Property and Liability and Miscellaneous Property checking accounts to include draft registers and bank statements;

Prepares annual comprehensive insurance survey for broker;

Assists client districts in claims reporting procedures and risk management related issues;

Assists with the coordination and application of various risk management accounting and fiscal reporting systems;

Assists with the preparation and maintenance of records, manuals and reports.

**NON-ESSENTIAL FUNCTIONS:**

Other duties as assigned

**CREDENTIALS, CERTIFICATES, LICENSES OR OTHER REQUIREMENTS:**

**EDUCATION AND EXPERIENCE:**

A typical qualifying background would include substantial work experience involving the application of insurance principles including analyzing and adjusting claims, assisting clients with claims reporting procedures and risk management related issues, and preparing and maintaining related financial records and reports. Experience applying computerized accounting/fiscal reporting systems is also required. College-level course work in business administration or a related field may be considered as partial fulfillment of the work experience requirement.

**KNOWLEDGE AND ABILITIES:**

**KNOWLEDGE OF:** Insurance policies and procedures; principles, operations and techniques of claims adjustment and analysis. General knowledge of risk management principles.

**ABILITY TO:** Communicate both orally and in writing; remain current on laws relating to insurance; learn, interpret and apply specific complex regulations and procedures; utilize a variety of accounting and fiscal reporting systems; make oral presentations; and exercise independent judgment.

**WORKING CONDITIONS & PHYSICAL ABILITIES:**

Office setting. Ability to travel to and from school/work sites as job requires.

Must be able to hear and speak to exchange information; see to perform assigned duties; sit and/or stand for extended periods of time; possess dexterity of hands and fingers to operate a computer and other office equipment; kneel, bend at the waist, and reach overhead, above the shoulders and horizontally, to retrieve and store files and supplies; lift light objects.

Established: 06/96

Revised: 01/08; 7/12