

14. Position Summary

This position is the line supervisor of insurance examiners responsible for monitoring the market analysis, market conduct, policy forms, underwriting, and actuarial process of property and casualty insurers. The section's functions include complaints handling, on-site examinations, data analyses, forms approval and rate review, enforcement action preparation, as well as policy, procedure and rule development in the property and casualty insurance areas.

15. Goals and Worker Activities

- 60% A. Supervise the monitoring of property and casualty (P&C) insurers for compliance with Wisconsin laws and rules relating to market conduct, policy forms, underwriting, and actuarial practice.
- A1. Supervise staff in the development and implementation of policies and procedures for the handling of consumer complaints and analyses of insurers, market conduct and market analysis for the P&C area.
 - A2. Supervise staff in the development and implementation of policies and procedures for the analyses of P&C insurers' policy forms, underwriting, and actuarial practice.
 - A3. Develop and implement criteria to pinpoint problems in the P&C area, and carry out examination schedules for on-site review of company practices.
 - A4. Develop and implement examination policies and procedures, including specifications for documentation and format of market conduct reports.
 - A5. Assign staff to market analysis, examination schedule, complaint workload, and forms approval workload, making continual adjustments to provide more efficient and effective staff mix.
 - A6. Personally participate in company analyses or on-site examinations as necessary to ensure that problems are resolved, and to observe staff performance.
 - A7. Review and approve P&C market conduct examination reports before submission to Bureau Director; screen section correspondence for accuracy and appropriateness.
 - A8. Supervise the preparation of enforcement actions for the Bureau Director's review; participate in investigations and litigation as necessary.
 - A9. Provide information to the director to be used in review of applications for admission, merger, consolidation, or incorporation from P&C insurers.

- 25% B. Supervise examiner and analyst staff assigned to the Property and Casualty (P&C) Section.
- B1. Recruit, screen, and recommend staff hirings as vacancies occur.
 - B2. Orient and evaluate new staff.
 - B3. Regularly set performance goals for each staff member, and follow up with periodic evaluations and revisions.
 - B4. Recommend and justify appropriate follow-up action to director based on evaluation results (including disciplinary actions and special training).
 - B5. Implement office and bureau administrative policies and procedures, including those related to civil rights and affirmative action, travel, and staff time.
 - B6. Develop and implement criteria for judging quality and quantity of complaints, market conduct and forms approval work done in the P&C area.
 - B7. Collect and analyze management information based on above criteria; take remedial action as necessary to improve performance of section.
 - B8. Develop policies and procedures to ensure smooth flow of work and information between P&C Section and Complaints/Central Services Section and coordination of activities with Property and Casualty Insurance Section.
- 10% C. Provide staff expertise to bureau, division, and office, relating to Property and Casualty insurance.
- C1. Advise management on insurance industry trends, problems, and other matters, especially as they relate to property and casualty (P&C) insurance, performing or supervising analyses as appropriate.
 - C2. Speak, and prepare written communications to inform the industry and the public about the P&C area.
 - C3. Testify and provide information for the legislature as assigned.
 - C4. Supervise the development of rules and statutes as assigned, after identifying problem areas through research and analysis.
 - C5. Lead, participate in, or monitor staff work in special activities as assigned, including:
 - National Association of Insurance Commissioners committees and task forces relating to P&C;
 - Wisconsin Insurance Plan board;
 - Commissioner's Advisory Committee on P&C;
 - Wisconsin Automobile Insurance Plan;
 - Local Government Property Fund work group;

Position #302320
Insurance Examiner Chief
August 12, 2014

- Legislative committees and study groups;
- Other special projects as assigned;
- Wisconsin Worker's Compensation Rating Bureau;

- 5% D. Implement agency's affirmative action plan in the Property and Casualty Section.
- D1. Meet with Bureau Director and discuss annual affirmative action goals and objectives.
 - D2. Implement plan after consultation with Bureau Director through the applications of effective hiring and recruitment techniques.
 - D3. Report to the Bureau Director on achievement of goals and objectives, identifying any reason for inability to achieve objectives.

Knowledge Skills and Abilities

1. Comprehensive and in-depth knowledge of property and casualty insurance operations, product lines, laws, regulations, and industry trends
2. Oversee staff duties relating to the review of policy forms, rate filings, and market conduct examinations.
3. Facilitate market conduct analysis and plan market conduct exam schedules
4. Prepare final complaint appeals decisions and exam compliance recommendations
5. Effective lead worker, supervisory skills, time management, and the willingness to delegate tasks
6. Facilitate administrative rule process
7. Well-developed oral, written, and interpersonal communications skills and media relations