

## APPENDIX A

### SCOPE OF SERVICES

Consultant will serve as the City's Interim Risk/Insurance Manager.

#### Job Summary

The Consultant will perform supervisory, professional, administrative and technical work in the management of the insurance and contractual risk division for the City. The Consultant will:

- perform the independent, complex work related to the review and application of insurance coverage, setting insurance requirements for vendors, managing certificates of insurance (COIs) and analyzing premium budgeting allocations, including the collection and maintenance of policy documentation/information;
- be responsible for developing, revising and managing operational procedures;
- applies and interpret industry insurance regulations, standards, policies, regulations and practices;
- maintains working relationships with appointing authorities, responsible department officials, purchasing/procurement vendors, service providers, and/or supplies, insurance carriers, governmental agencies, employees, the public, and others;
- be a creative senior manager to lead, motivate, train and implement teamwork to achieve department objectives;
- exercise independent judgement in making insurance and risk transfer decisions. Unprecedented and the most significant determinations are sometimes subject to final review and approval by the City Manager and City Attorney's Office;

#### Essential Job Functions:

The Consultant will perform the following list of essential functions within this role. The list is not exhaustive, and the omission of an essential function does not preclude management from assigning duties not listed if such functions logically align with the position:

- Supervises, trains, assigns and reviews work of personnel performing a variety of duties in connection with City insurance program and insurance requirements in the contractual risk transfer program.
- Plans, organizes and coordinates the renewal process for all insurance policies each year, including oversight and assistance in gathering exposure data, loss information and application completion.
- Reviews insurance policies for accuracy and coordinates necessary modifications
- Manages and assists with contract reviews as well as develops, monitors, or evaluates appropriate insurance terms, conditions and limits.
- Prepares and manages data and information for management officials, department officials, brokers, insurance companies, and the State of Florida.
- Consults with legal representatives, representatives of the insurance industry, and regulatory agencies in connection with the preparation and award of contracts and other matters.

- Prepares specifications and bid information necessary for writing the request for proposals (RFP) on a diverse and broad range of insurance policies/contracts.
- Prepares specifications for Risk Department Request for Proposals (RFP) and manages department contracts for Broker Services, Risk Management Information System (RMIS), certificates tracking and other department contracts.
- Manages the certificates of insurance from insurance brokers for the departments, directors and management.
- Develops insurance requirements for a large range of Cooper City solicitations.
- Reviews and monitors contracts, makes recommendations, and participates in negotiations regarding insurance requirements for contractual transfer.
- Manages certificates of insurance for vendors doing business with Cooper City.
- Conduct investigations into incidents, accidents, or claims to determine root causes and prevent recurrence.
- Establish and supervise an effective safety and loss prevention program.
- Discusses insurance requirements with vendors, brokers/agents, and other agencies or departments.
- Provides expert technical expertise and guidance to City agencies on liability insurance and contract laws and regulations.
- Provides technical guidance and recommendations to support claims adjusters on liability insurance, regulatory, and legal precedents.
- Assist in the department and other departments associated with risk management-related budget process.
- Performs other related job duties as assigned.

**Assigned Employee:** Eddie Beecher

**Position Title:** Interim Insurance/Risk Manager

**Estimated Weekly Working Hours:** 10 hours