



**DISTRICTS MUTUAL INSURANCE
& RISK MANAGEMENT SERVICES**

Succession Plan

**Version V
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Introduction

This Succession Planning document is intended to assist the DMI Board of Directors and staff to identify key staff and/or service provider replacements as the need may arise.

To assist in the DMI staff replacement process, the expertise of an external search firm may be called upon to provide executive recruitment for permanent replacement or as interim leaders.

Succession Planning for District Mutual Insurance & Risk Management Staff

DMI President – Position Description

Position Title: President and COO

Reports to: DMI Board of Directors (BOD)

General Role Description

The President serves as the Chief Operating Officer and is responsible for providing strategic leadership, integration and implementation of long-range goals, strategies, plans and procedures for the day-to-day operation of DMI. The objective is to provide management and leadership for all aspects of DMI operations and support functions.

Position Responsibilities and Proficiencies

Analytical Thinking:

- Ability to analyze company operational risks and develop workable mitigation strategies.
- Identifies the important Company risk issues and areas of significant concern or opportunity.
- Considers different approaches that are relevant to the Company risk mitigation process.
- Anticipates the possible outcome of potential solutions.
- Monitors and identifies trends in insurance market place that may impact the operations of DMI and/or the member Technical Colleges.

Consulting:

- Uses professional knowledge, experience and technical expertise to respond to questions, facilitate problem solving, and generally advise and provide guidance for the company, the board of directors and college members on insurance issues including coverage, claims advocacy regulatory compliance and daily operations.
- Advises senior college leaders on risk analysis and risk prioritization.
- Advise BOD of industry trends, coverage and service alternatives.
- Interprets coverage and resolves issues for member colleges and claimants.
- Provides consultation and guidance to the DMI member Technical Colleges on risk and insurance related issues.
- Serves as a resource for the review of major contracts, proposed facilities and /or new program activities for risk/loss control and insurance implications.
- Monitors legislative and regulatory changes that may affect DMI and/or the member colleges. Advises on the impact of any changes.

DMI Business Operations:

- Maintains overall fiduciary responsibility by planning, developing, organizing, implementing, directing and evaluating DMI fiscal functioning and performance.
- Directs, manages and is responsible for all DMI's regulatory compliance, including supervision of preparation of all financial statements and reports, insurance policies, rates and underwriting rules and all other regulatory filings and



compliance requirements.

- Directs and manage DMI's Risk Financing Program; identifies and evaluates all risk financing options; evaluates the need for coverage, terms, limits and retention levels.
- Plans, directs and manages the negotiation and placement of all insurance coverage. Directs, monitors and evaluates the activities of the broker(s) and third-party claims administrator(s), as well as the accounting firm, actuary, legal counsel and bank. Periodically conducts due diligence to ensure cost effectiveness and efficiency.
- Directs and coordinates the activities of legal counsel to maintain control over the claims process to assure that claims are being settled consistently and in the best interests of the DMI member Technical Colleges.

Information Seeking:

- Gathers and analyzes data on current and future trends in the commercial insurance industry.
- Researches information on issues impacting the operation of DMI and directs the problem-solving process.
- Provides research information and recommends solutions to maintain the continuity of DMI operations.

Teaching:

- Researches industry data to prepare for educational presentations to Technical College representatives.
- Is proficient in delivering in-person presentations and webinars.
- Models and sets the DMI culture, values, and behavior.
- Coordinates the conducting of Risk Management seminars, webinars, teleconferences and meetings, to inform members of recent and relevant risk management topics.

Risk Management:

- Assists with risk assessment and risk prioritization.
- Identifies risks reduction strategies for consideration for College development and implementation.
- Recommends actions for the long-term mitigation of risk.

Teamwork:

- Collaborates with the DMI Consultant team in the pursuit of common vision, values and goals.
- Places DMI team needs and priorities above personal needs.
- Involves others in making decisions that affect the DMI team mission.
- Draws on the strengths of colleagues and gives credit to others' contributions and achievements.
- Manages and evaluates the DMI Safety and Loss Prevention consultant, Business Continuity and Crisis Response consultant, Campus Security consultant, and Administrative Assistant.

Thoroughness:

- Demonstrates attention to detail and accuracy.
- Defines and organizes tasks, responsibilities and priorities.
- Takes responsibility for timely completion of assignments.
- Takes initiative to ensure that outcomes meet DMI and college requirements.
- Utilizes DMI team members and BOD members for feedback and guidance for consultation practice and testing of new and/or creative ideas.
- Performs administrative and professional duties as required for planning, organizing, implementing and directing the business activities of Districts Mutual Insurance and Risk Management Services.

Education, Experience and Expertise:

- Has minimum 10 years full-time senior leadership in risk management or insurance carrier management and/or practical experience.
- Demonstrates excellence in oral and writing skills.



- Conveys a thorough understanding of risk management principles.
- Demonstrates an understanding of the operation and unique challenges of the Wisconsin Technical Colleges.
- Shows proficiency in higher education risk identification, mitigation, and management.
- Has experience in successfully managing the daily operations of an insurance company and a risk management service provider.
- Has experience in the placement of re-insurance/excess insurance; managing 3rd party service providers, and claims administration.
- Demonstrates an ability to interact and work cooperatively in a team environment.
- Shows an understanding of the role of an autonomous “client centered” business model with a primary focus on Technical College support.
- Has ability to work autonomously in a remote setting with minimal supervision.

DMI President and COO – Succession Planning Description

Required Educational Credentials

Bachelor’s degree in Risk Management or Finance from an accredited college or university; Master’s degree preferred.
Professional designations desired: ARM, ARM-P, CRM or CPCU.

Required Education, Experience and Expertise

Minimum 10 years full-time senior leadership in risk management or insurance carrier management and/or practical experience.

Demonstrates excellence in oral and writing skills

Understands risk management principles.

Understands the operation and unique challenges of the Wisconsin Technical Colleges.

Proficient in higher education risk identification, mitigation, and management.

Experienced in successfully managing the daily operations of an insurance company and a risk management service provider.

Experienced in the placement of re-insurance/excess insurance; managing 3rd party service providers, and claims administration.

Has ability to interact and work cooperatively in a team environment.

Understands the role of an autonomous “client centered” business model with a primary focus on Technical College support.

Potential Candidates

Candidates will be identified when necessary.

Need to develop a strategy to identify interested candidates from the Wisconsin Technical College System or other resources.

Candidate Developmental Tasks

Will develop a thorough understanding of the DMI insurance coverage and support services provided to the Technical Colleges.

Will meet with the DMI Consultant team to develop an understanding of team interaction, cooperation and shared responsibilities, goals and objectives.

Will develop a thorough knowledge of the DMI outsourced model including employment contracts and infrastructure services agreements.

Will develop a thorough understanding of college claim experience, loss trends, and legal proceedings.

Will attend regular meetings with Board of Directors to implement operational and strategic plans.

If possible, will overlap with the incumbent departure for the purpose of mentoring in DMI operational tasks.



DMI Environmental Health & Safety Consultant – Position Description

Position Title: Environmental Health & Safety Consultant

Reports to: DMI President

General Role Description

Under the general supervision of and in collaboration with the DMI President, proactively works to identify, assess, manage and monitor the risk, claim, and EHS administration practices for DMI.

Position Responsibilities and Proficiencies

Analytical Thinking:

- Ability to visualize, articulate, and conceptualize both complex and uncomplicated problems by making decisions that are sensible given the available information. Such skills include demonstration of the ability to apply logical thinking to breaking complex problems into their component parts for workable solutions.

Consulting:

- Is available to consult with college EHS/RM contacts either via phone, email, or in person. Consultation can range from evaluating safe work/learning practices to assisting with Workers Compensation claim reviews.

EHS Development:

- Will assist the colleges in the development of their own EHS plans, guiding them through a prioritization process to determine needs for written programs, training, etc.

Information Seeking:

- Will establish key contacts with vendors e.g. Hartford Steam Boiler, DSPS consultants, and Risk Control staff from United Heartland, Gallagher, etc. as well as from other professional organizations such as URMIA, ASSE, NSC, etc.

Teaching:

- Is authorized by OSHA to conduct 10 & 30-hour General Industry training for college employees. Training materials should be customized to meet the needs of public sector employers.

Risk Management:

- Has ability to bridge Environmental Health and Safety to Risk Management. Example: correlate how a safe working/learning environment can reduce vulnerability, thus reducing risk exposures to the colleges.

Teamwork:

- Has ability to collaborate with other consultants of DMI and the EHS/RM representatives from the colleges to develop a wide variety of programming (meetings/training), written materials, and other resources for DMI and the colleges.

Thoroughness:

- Is attentive to accuracy and detail in all aspects of their work.

Education, Experience and Expertise:

- Consultant will have a minimum of a Bachelor's degree in Occupational Safety from an accredited college or university. A Master's degree in Environmental Safety and Health is preferred.



DMI Environmental Health & Safety Consultant – Succession Planning Description

Required Educational Credentials
Bachelor degree in Occupational Safety from an accredited college or university; Master degree in Environmental Safety and Health preferred.
Minimum 5 to 7 years full-time occupational experience; including responsibility for coordinating comprehensive risk and loss control and in-house safety programs.
Certified Safety Professional and/or Certified Industrial Hygienist designation is highly desirable.
An equivalent combination of related education, training, and experience from which comparable knowledge and abilities have been acquired is necessary.

Required Education, Experience and Expertise
Demonstrates excellence in oral and writing skills.
Maintains a thorough understanding of Risk Management principles as they correlate to Environmental Health and Safety.
Has an understanding of the operation and unique challenges of the Wisconsin Technical Colleges.
Is proficient in higher education risk identification, mitigation and management.
Ability to interact and work cooperatively in a team environment.
Demonstrates an understanding the role of an autonomous “client centered” consultant with a primary focus on Technical College support.
Provides value added support the Technical Colleges pertaining to Risk and Environmental Health & Safety.
Works closely with Technical College to assist them to follow DSPS/OSHA, Department of Natural Resources, and other applicable environmental, health and safety regulations/laws as well as nationally recognized standards of good practices as it pertains to faculty, staff/employees, contractors/vendors, students and the public.
Is well-informed of pending regulatory developments and best practices; monitors legislative agendas at state and federal levels.
Has knowledge of chemical, hazardous waste, industrial hygiene, DSPS/OSHA and environmental health standards.
Demonstrates skill in examining and re-engineering operations and procedures, formulating policy, developing and implementing new strategies and procedures.
Has computer competency – Word, Excel, PowerPoint, etc.
Is able to travel extensively in state to perform the functions of the position.
Maintains certification as may be required.

Potential Candidates
Candidates will be identified when necessary.
Will develop a strategy to identify interested candidates from the Wisconsin Technical College System who meet the educational and experience requirements.

Candidate Developmental Tasks
Will develop leadership skills for technical assistance and guidance in the development, implementation and maintenance of a comprehensive environmental, health and safety program, incident investigation, vehicle and operation equipment safety and emergency preparedness.
Will develop the ability to serve as a resource for environmental health, and safety representative from each college.
Will develop skill in consultation and guidance for the identification and management of hazards as well as the preventions of incidents.
Will develop the ability to assist colleges in monitoring loss control/prevention programs.
Will develop the skill to create /recommend polices for review and endorsement by the Colleges.
As necessary, conducts EHS workshops/webinars to inform Colleges on topics related to safety and loss control.
Will develop the ability to assist in creating long-term plans and objectives for DMI risk management and loss control



objectives. Evaluate program effectiveness.
Will develop the skill to analyze data and information and prepare/deliver reports for the DMI quarterly meetings.
Will develop the skill to coordinate and conduct Biennial Safety Audits for all the Technical Colleges.
Will develop the skill to conduct training for colleges as requested, e.g. OSHA 10 and/or 30-hour general industry and other types as needs arise.
Will develop the skill to mentor in DMI required tasks, e.g. job shadow. If possible, overlap in the incumbent departure and the candidate's entrance to DMI.
Will review past audits/reports/correspondence, etc. to develop an understanding of past precedence.

DMI Business Continuity and Crisis Response (BCCR) Consultant – Position Description

Position Title: Business Continuity and Crisis Response Consultant

Reports to: DMI President

General Role Description

The Business Continuity and Crisis Response (BCCR) Consultant is responsible for providing support for the development, integration and implementation of Business Continuity Plans (BCP) and Emergency Response Plans (ERP), and associated consultation, training and testing for the Wisconsin Technical Colleges. The objective of planning and consultation is to facilitate timely operations recovery following a college business interruption caused by a natural disaster, man-made crisis, technological failure or attack, public health concern or image/reputation crisis. The BCCR Consultant assists with identifying and mitigating risk to human capital, property, equipment and finance, and critical Technical College functions remain operational.

Position Responsibilities and Proficiencies

Analytical Thinking:

- Has ability to analyze college operations risks and develop workable mitigation strategies.
- Identifies the important College risk issues and areas of significant concern or opportunity.
- Considers different approaches that are relevant to the College risk mitigation process.
- Anticipates the possible outcome of potential solutions.

Consulting:

- Uses professional knowledge, experience and technical expertise to respond to questions, facilitate problem solving, and generally advise and provide guidance to colleges regarding business continuity plan development and implementation issues.
- Advises senior college leaders on risk analysis and risk prioritization.
- Identifies BCCR planning and implementation considerations.
- Gathers research data to support BCCR plan development recommendations.
- Applies Business Continuity best practices and experience to facilitate planning decisions.

Business Continuity Plan (BCP) Development:

- Uses education, experience and expertise to assist the Technical Colleges with the development of user friendly and effective BCPs.
- Assists in developing BCPs that are both strategic and tactical.
- Includes strategies for business interruption preparedness, response to and management of business interruptions, and recovery to full functionality.



Information Seeking:

- Gathers and analyzes data on current and future trends in BCCR best practices.
- Researches information on issues impacting the progress of BCCR plan development and implementation, and assists with resolving process problems.
- Monitors the response and management of campus crises at the Technical Colleges and identifies “lessons learned.”
- Translates research information into recommendations that enhance Technical College continuity of operations performance.

Teaching:

- Researches timely BCCR data to prepare for educational presentations to Technological College representatives.
- Is proficient in delivering in-person presentations and webinars.

Risk Management:

- Assists with risk assessment and risk prioritization.
- Identifies risks reduction strategies for consideration in Business Continuity Plan development and implementation.
- Recommends actions for the long-term mitigation of risk.

Teamwork:

- Collaborates with other DMI Consultants in the pursuit of common vision, values and goals.
- Places DMI team needs and priorities above personal needs.
- Involves others in making decisions that affect the DMI team mission.
- Draws on the strengths of colleagues and gives credit to others' contributions and achievements.

Thoroughness:

- Demonstrates attention to detail and accuracy.
- Defines and organizes tasks, responsibilities and priorities.
- Takes responsibility for timely completion of assignments.
- Takes initiative to ensure that outcomes meet DMI and college requirements.
- Utilizes DMI senior manager for feedback and guidance for consultation practice and testing of new and/or creative ideas.

Education, Experience and Expertise:

- Bachelor degree in Business Administration or Emergency Management from an accredited college or university; Master’s degree preferred.
- Minimum of 5 years full time Business Continuity and Crisis Response consultation and/or practice experience. “Hands on” experience in crisis response and management preferred.
- Demonstrated excellence in oral and writing skills.
- Understanding of the operations and the unique risks of the Wisconsin Technical Colleges.
- Has proficiency in higher education risk identification, mitigation and management.
- Has experience in successfully managing the development of business continuity plans.
- Has experience in successful Identification of business continuity requirements and solutions.
- Has experience in developing and conducting Business Continuity Plan testing exercises, i.e. tabletop exercises.
- Has basic understanding of higher education insurance coverage.
- Has ability to interact and work cooperatively in a team environment.
- Understands role of consultant as “behind the scenes” professional with primary focus on Technical College support.
- Has ability to work autonomously in a remote setting with minimal supervision.



DMI Business Continuity and Crisis Response Consultant – Succession Planning Description

Required Educational Credentials

Bachelor degree in Business Administration or Emergency Management from an accredited college or university; Master's degree preferred.

Required Education, Experience and Expertise

Has a minimum 5 years full time Business Continuity and Crisis Response consultation and/or practice experience. Prefer "hands on" experience in crisis response and management.

Demonstrates excellence in oral and writing skills.

Understands Risk Management principles.

Understands the operation and unique challenges of the Wisconsin Technical Colleges.

Is proficient in higher education risk identification, mitigation and management.

Has experience in successfully managing the development of business continuity plans.

Has experience in developing and conducting Business Continuity Plan testing exercises, i.e. tabletop exercises.

Has ability to interact and work cooperatively in a team environment.

Understands the role of an autonomous "client centered" consultant with a primary focus on Technical College support.

Potential Candidates

Candidates will be identified when necessary.

Will develop a strategy to identify interested candidates from the Wisconsin Technical College System who meet the educational and experience requirements.

Candidate Developmental Tasks

Will develop a thorough understanding of the contract model of DMI employment including the benefits and requirements of the employing organization.

Will acquire a comprehensive knowledge of the vision, mission and values of DMI.

Will develop a general understanding of the DMI insurance coverage provided to the Technical Colleges.

Will meet with the DMI President and Consultant team to develop an understanding of team interaction, cooperation and shared responsibilities.

Will review and understand the Business Continuity and Crisis Response Consultant practice expectations and requirements.

Will review and understand past college Business Continuity plan development projects.

Will meet with a representative group of Technical College staff responsible for Business Continuity planning to discuss Consultant performance and expectations.

If possible, will overlap in the incumbent departure for the purpose of mentoring in DMI consultation tasks.

DMI Security Consultant – Position Description

Position Title: Security Consultant

Reports to: DMI President

General Role Description

Under the general management of, and in collaboration with the President, proactively work in a consultative manner to identify, assess, monitor and assist the Wisconsin Technical Colleges to plan, implement, and manage local Campus Security.



Position Responsibilities and Proficiencies

Analytical Thinking:

- Ability to understand, interpret, and explain policies, procedures, written and oral instructions and to plan and evaluate security programs. Maintain skills for examining and re-engineering security operations and procedures, formulating policy, developing and implementing new strategies and procedures. Analyze data and information and prepare and deliver reports.

Consulting:

- Provide consultation and guidance for the identification and management of campus security risks. Advise on the hiring, training, supervision, and ongoing staff development for the Colleges' security staff including contracted and/or student aides. Advise on the development or revision of campus security policies and procedures, training manuals, investigative protocols, and report formats. Conduct reviews of campus security system capabilities and make recommendations for improvements. Consult / advise the Colleges on liaison efforts with local law enforcement and other emergency services (EMT, Fire, etc.)

Campus Security Development:

- Provide leadership, technical assistance, and guidance in the development, implementation, and maintenance of a comprehensive campus security program for the Colleges. Advise on the hiring, training, supervision, and ongoing staff development for the Colleges' security staff including contracted and/or student aides. Advise on the development or revision of campus security policies and procedures, training manuals, investigative protocols, and report formats.

Information Seeking:

- Keep abreast of current or pending regulatory developments and best practices, monitor "hot topics" in higher education, and advise college security staff. Analyze data and information and prepare and deliver reports.

Teaching:

- Conduct topical presentations via webinar, teleconference, or workshop format to inform the Colleges on subject matter related to higher education campus security. Promote DMI through attending and/or conducting presentations at professional and trade association conferences for higher education.

Risk Management:

- Provide consultation and guidance for the identification and management of campus security risks and serve as a resource for campus security management for the Colleges.

Teamwork:

- Ability to foster a cooperative work environment while demonstrating excellent customer service skills.

Thoroughness:

- Ability to prepare, analyze, submit, and maintain comprehensive records, reports, and statistical data related to security services and programs and make recommendations as appropriate. Deliver reports orally or in writing as required.

Education, Experience and Expertise:

Criminal Justice or Law Enforcement Bachelor's degree -or- Associate Degree with successful completion of upper management training/qualifications (e.g. FBI Academy, Law Enforcement Executive Development, Police Staff and Command, Executive Management Institute).



Previous law enforcement experience that shall include 5 years supervisory and upper management experience. Campus Security Management experience in a Collegiate environment for a minimum of 7 years. Candidate shall be knowledgeable of Wisconsin Firearm licensing regulations; shall be able to consult with and advise College security staff on meeting various licensing requirements.

Other skills that would be required are knowledge of financial/business analysis techniques. Computer competency – Microsoft Office, e-mail, internet, etc. Maintaining a valid driver’s license and adequate auto insurance coverage. Ability to travel extensively throughout Wisconsin to support the functions of the Security Consultant and the Wisconsin Technical Colleges. Maintain certification(s) as may be required for Security Consultant integrity and expertise.

DMI Security Consultant – Succession Planning Description

Required Educational Credentials
Criminal Justice or Law Enforcement Bachelor’s degree -or- Associate Degree with successful completion of upper management training/qualifications (e.g. FBI Academy, Law Enforcement Executive Development, Police Staff and Command, Executive Management Institute).
Required Education, Experience and Expertise
Demonstrates excellence in oral and writing skills.
Has ability to prepare, analyze, submit, and maintain comprehensive records, reports, and statistical data related to security services and programs and make recommendations as appropriate. Deliver reports orally or in writing as required.
Demonstrates a thorough understanding of security principles and best practices.
Understands the operation and unique challenges of the Wisconsin Technical Colleges.
Proficient in higher education security risk identification, mitigation and management.
Ability to interact and work cooperatively in a team environment and demonstrates excellent customer service skills.
Understands the role of an autonomous “client centered” consultant with a primary focus on Technical College support.
Has previous law enforcement experience that shall include 5 years supervisory and upper management experience. Campus Security Management experience in a collegiate environment for a minimum of 5 years.
Demonstrates knowledge of Wisconsin State laws, WIS-DOT MVR, CCAP, and Wisconsin Law Enforcement Training and Standards Bureau policies/methods.
Maintains familiarity with the mutual aid agreements, local and state law enforcement resources, ability to liaison with law enforcement agencies on all government levels.
Has ability to understand, interpret, and explain policies, procedures, written and oral instructions and to plan and evaluate programs.
Maintains skill in examining and re-engineering operations and procedures, formulating policy, developing and implementing new strategies and procedures.
Has knowledge of financial/business analysis techniques.
Is knowledgeable in the WI Firearm licensing regulations; shall be able to consult with and advise College Security Staff on meeting various licensing requirements.
Demonstrates computer competency – Microsoft Office, e-mail, internet, etc.
Maintains a valid driver’s license and adequate auto insurance coverage.
Has ability to travel extensively throughout Wisconsin to support the functions of the position.
Maintains certification as may be required.
Potential Candidates
Candidates will be identified when necessary.
Will develop a strategy to identify interested candidates from the Wisconsin Technical College System who meet the



educational and experience requirements.
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Candidate Developmental Tasks

Will be mentored in DMI required tasks.

Will receive orientation to technical college environment.
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Will receive orientation to Clery Act, Title IX, Emergency Mass Notification systems, Campus security practices for higher education.

Introduce to higher-education security resources, such as: Clery Center, National Center for Campus Public Safety, Disaster Resilience Universities, International Association of Campus Law Enforcement Administrators (IACLEA), American Society of Industrial Security (ASIS), Campus Safety on Line.
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If possible, will overlap with the incumbent departure and the candidate's entrance to DMI.

DMI Administrative Assistant – Position Description

Position Title: Administrative Assistant

Reports to: DMI President

General Role Description

The Administrative Assistant provides administrative support to the President and Consultants, acting with little supervision, anticipating needs while managing day-to-day workflow and prioritizing various projects including maintenance of DMI online resources, contact management, preparing materials for meetings, creating marketing/promotional materials, cultivating Member relationships, and participating in a wide range of special projects. The Administrative Assistant performs, coordinates and oversees administrative duties while providing highly responsive, accurate, and timely support; thus, enabling the President and DMI Consultants to work more efficiently and effectively towards reaching the organization's goals. Administrative Assistant conveys a professional company image through verbal, electronic, online, and in-person interactions.

Position Responsibilities and Proficiencies

Analytical Thinking:

- Ability to visualize, articulate, and conceptualize both complex and uncomplicated problems by making decisions that are sensible given the available information.
- Balances conflicting priorities to manage workflow, ensure the completion of essential projects, and meet critical deadlines. Must be highly organized.
- Exhibits sound judgment and the ability to make reasonable decisions in the absence of direction. Works effectively without constant/direct supervision.
- Utilizes analytical skills and demonstrate a broad understanding of the business to effectively interpret and anticipate needs. Anticipates staffs' needs, providing the highest level of initiative and support including research, preparation, and assembly of information for meetings.
- Demonstrates flexibility in the face of change and projects a positive demeanor regardless of task changes.
- Applies strategic business thinking to support President and Consultants. Understands the organization's business and executives' roles.

Consulting:

- Availability to consult with other staff members, corporate service providers, and Technical College members via phone, email, or in person promptly, with accuracy and a courteous demeanor.



- Uses professional knowledge, experience and technical expertise to respond to questions, facilitate problem solving, and generally advise and provide guidance to staff and Technical College Members.
 - Guidance and/or assistance provided to DMI President and Consultants may include (but not limited to) technology technical assistance with devices, software/hardware; presentation set up; documentation creation, editing, and/or retrieval; and contact management.
 - Guidance to Technical College Members may include (but not limited to) navigation of corporate website, documentation, insurance policies/coverages, Motor Vehicle Records, etc.
- Facilitates, builds, and monitors relationships including maintaining contacts in database.

Administrative Development and Responsibilities:

- Use education, experience, expertise to assist DMI President & Consultants by performing general clerical duties including but not limited to: creating and modifying documents using Microsoft Office and Adobe software, photocopying, faxing, mailing, filing; and designing, updating, maintaining DMI's website using Adobe software.
- Serve as "central repository" for DMI records.
- Has extensive knowledge of Microsoft Office, proficiency in typing, filing and other clerical required skills.
- Will setup and/or coordinate DMI quarterly meetings: organize, create, and distribute support materials – aid or arrange for facilities/catering/technology needs – be in attendance to offer clerical/technical support.
- Designs, edits, and electronically produce/distribute monthly newsletter (The Incident Report) using Adobe software.
- Designs, and procures promotional and marketing materials, including an Annual Report and other printed materials, under direction from the President, using Adobe software.
- Ensures DMI President and Consultants are prepared for upcoming appointments by creating presentations or gathering materials necessary for meetings.
- Demonstrates advanced proficiency by quickly adapting to new technology and acquiring new technical skills.
- Is an excellent relationship builder; able to demonstrate a high level of tact, discretion, diplomacy with all internal and external contacts. Must demonstrate the ability to maintain confidential and/or sensitive information.
- Works with contracted vendors / service providers to facilitate high quality services / presentations delivered to DMI members.
- Is knowledgeable of marketing and promotional material creation, including web design/maintenance; and an extensive knowledge of Adobe software used for the day-to-day operations of the company.

Information Seeking:

- Will draft and edit correspondence, articles, reports and presentations; as well as, transcribe meeting notes.
- Coordinates and manages special projects, including working collaboratively with staff to assure projects meet deadlines.

Teaching:

- Promotes DMI through attending and/or conducting presentations (webinars) during corporate meetings and functions.
- Coordinates and set up of Risk Management seminars, through webinars, teleconferences and meetings. Informs members of recent and relevant risk management topics/issues.
- Coordinates and develops promotional/support materials for quarterly DMI Presents...training series via webinar. Is technical administrator and support for the webinars.
- Must have skill to troubleshoot and serve as technical support for DMI web-based programs and teleconferences.

Risk Management:

- Coordinates the procurement and evaluation of, and response to all Technical College Motor Vehicle Record requests.



Teamwork:

- Collaborates with DMI President and Consultants in their development efforts on a wide variety of programming (meetings/training), written materials, and other resources for DMI and the Technical Colleges' use.
- Collaborates with DMI President and Consultants in the pursuit of a common vision, values and goals.
- Willingly provides back-up support for DMI President and Consultants when appropriate. Actively supports group goals. Places DMI team *needs and priorities* above personal needs and priorities.
- Supports staff in assigned project-based work.

Thoroughness:

- Performs administrative and professional duties as required for planning, organizing, implementing and supporting the day-to-day operations/activities of Districts Mutual Insurance and Risk Management Services.
- Defines and organizes tasks, responsibilities and priorities. Takes responsibility for timely completion of assignments and demonstrate attentiveness to accuracy and detail in all aspects of required work/tasks. Take initiative to ensure outcomes meet DMI and college member requirements.
- Utilizes DMI President and Consultants for feedback and guidance on completed work and presentation of new and/or creative ideas.
- Has organizational skills that complement the preparation, analysis, submission, and maintain of comprehensive records, reports, and statistical data on services and programs. Be confident to present recommendations as deemed necessary.

Education, Experience and Expertise:

- Bachelor's degree from an accredited institution preferred. Technical College or Associate's degree in Marketing, Administration / Administrative Support, Graphic Design along with three to five years administrative support experience considered. Long term work experience in field of Marketing, Editing/Graphics, Branding, IT/Website Design, Administration and Board Relations, Project Management, and Virtual Office Management, considered.
- Strong customer service orientation; anticipates and acts on what's needed.
- Strong analytical, organizational, and problem-solving skills; able to effectively prioritize projects and manage expectations.
- Excellent interpersonal (written and oral communication) skills; diplomatic, personable, and highly collaborative with a "can do" orientation.
- Extensive knowledge of Microsoft Office, proficiency in typing, filing and other clerical skills required.
- Has experience/knowledge proficiency in marketing and promotional material creation is required; including web design and maintenance. Must have extensive knowledge of Adobe software (Illustrator, Photoshop, InDesign, Acrobat, GoLive/Dreamweaver) and various other software/hardware platforms required. Must be able to learn additional platforms as necessitated for the day to day functions of the company.
- Able to troubleshoot and serve as technical support for DMI web-based programs and teleconference meetings/programs.

DMI Administrative Assistant – Succession Planning Description**Required Educational Credentials**

Bachelor's degree from an accredited institution preferred. Technical College or Associate's degree in Marketing, Administration / Administrative Support, Graphic Design along with three to five years administrative support experience considered. Long term work experience in field of Marketing, Editing/Graphics, Branding, IT/Website Design, Administration and Board Relations, Project Management, and Virtual Office Management, considered.



Required Education, Experience and Expertise
Uses education, experience and expertise to assist DMI President and Consultants by performing general clerical duties including but not limited to: creating and modifying documents, photocopying, faxing, mailing, filing; and design, update, maintain the company website. Perform administrative and professional duties as required for planning, organizing, implementing and supporting the day to day operations/activities of Districts Mutual Insurance and Risk Management Services.
Has an excellent interpersonal (written and oral communication) skills; diplomatic, personable, and highly collaborative with a “can do” orientation.
Demonstrates strong analytical, organizational, and problem-solving skills; able to effectively prioritize projects and manage expectations.
Has a strong customer service orientation. Excellent relationship builder; able to demonstrate a high level of tact, discretion, diplomacy with all internal and external contacts. Must demonstrate the ability to maintain confidential and/or sensitive information.
Demonstrates extensive knowledge of Microsoft Office, proficiency in typing, filing and other clerical skills required.
Has experience/knowledge proficiency in marketing and promotional material creation, including web design and maintenance. Has noteworthy knowledge of Adobe software (Illustrator, Photoshop, InDesign, Acrobat, GoLive/Dreamweaver) and various other software/hardware platforms. Ability to learn additional platforms as necessitated.
Able to troubleshoot and provide technical support for web-based platforms, programs and teleconference meetings.
Has organizational skills that complement the preparation, analysis, submission, and maintain of comprehensive records, reports, and statistical data on services and programs. Be confident to present recommendations as deemed necessary.
Has ability to define and organize tasks, responsibilities and priorities. Takes responsibility for timely completion of assignments and demonstrate attentiveness to accuracy and detail in all aspects of required work/tasks. Take initiative to ensure required outcomes.
Works effectively without constant/direct supervision or guidance.
Collaborates with staff in their development efforts of wide range programming (meetings/training), written materials, and other resources for the members.
Promotes DMI through webinar presentations during corporate meetings and functions.
Adapts quickly to new technology and acquiring new technical skills.
Has skills to setup and/or coordinate quarterly meetings: organize, create, and distribute support materials; aid or arrange for facilities/catering/technology needs; and be in attendance to offer clerical/technical support. Additionally, must be able to visualize, articulate, and conceptualize both complex and uncomplicated problems by making decisions that are sensible given the available information.
Understands Risk Management principles.
Can interact and work cooperatively in a team environment.
Potential Candidates
Candidates will be identified when necessary. May need to divide into two positions: IT/Web Design/Marketing and Administration/Office Management.
Will develop a strategy to identify interested candidates from the Wisconsin Technical College System or other resources who meet educational and experience requirements.
Candidate Developmental Tasks
Will develop an understanding of DMI day to day operations, insurance coverage/policies, and required support services provided to the President, DMI Consultants and the Technical Colleges.



Will develop an understanding of DMI's motor vehicle record (MVR) check management program.
Will develop an understanding of the operation and unique challenges of Wisconsin's Technical Colleges and higher education facilities.
Will identify and introduce DMI web-based platforms for maintenance and/or updating – DMI Website, DMI Presents... training webinars, Risk Partner
Will develop the ability to prepare DMI marketing/promotional branded documents and materials – monthly "The Incident Report" newsletter, the bi-annual report – "Innovation in Progress Report", etc.
Will maintain DMI electronic records – "central repository"
Introduce and work with outside vendors / service providers.
Will serve as resource to DMI Consultants, service providers, and Technical College members.
Will attend regular meetings with Board of Directors and Risk Managers to provide administrative support.

