

Position Description

Director of Trust Operations

Position: Director of Trust Operations
Department: Member Services - Insurance Program
Last revised: July 2018

Reports to: Chief Executive Officer, Aim
Position type: Exempt

Goals - Aim Medical Trust

- Maintain the Trust's fiscal health and long term sustainability.
- Manage health care costs for the Trust and its members.
- Maintain the Trust as a leader in addressing members' benefit needs in the changing healthcare environment.
- Continue to promote the benefits of the Trust to increase member awareness and knowledge of the Trust's scope and effectiveness.
- Utilize innovations and technology in plan design and education efforts.
- Increase municipal participation in total health management, the sum total of all the actions an employer can take to support the health, productivity, and wellbeing of its employees.

Purpose of the Position

The purpose of this position is to lead and manage the Aim Medical Trust. The Director of Trust Operations works with the Aim Chief Executive Officer in the development of Trust policies, procedures, strategic planning, and the implementation and accomplishment of annual goals and objectives.

Essential Duties and Responsibilities

- Directs program by overseeing benefit plans offered; monitoring claims activity and financial status; responding to inquiries and appeals; promoting wellness efforts; overseeing Medicare part D reconciliations; and serving as HIPAA Privacy Officer.
- Oversees and evaluate third party vendors by monitoring performance; scheduling vendor meetings; assuring vendor meets contractual requirements; managing fee arrangements with consultants; and negotiating contractual terms. Outside vendor oversight includes, but is not limited to:
 - Coordinates with Legal Counsel and direct reports on the compliance of the security requirements of HIPAA and compliance of PPACA regulations.
 - Engages an independent certified public accountant who is appointed by and reports directly to the Board of Trustees to perform an annual financial audit of the Trust and to report such audit findings to the Members.
 - Engages an independent and qualified actuary who is appointed by and reports directly to the Board of Trustees to perform actuarial calculations and provide advice regarding the sufficiency of the Loss Funds as frequently as is required for prudent management.
- Ensures all MEWA filings are submitted timely and accurately to the Indiana Department of Insurance.
- Supervises the Benefits Administrator, the Client Services Director, and all other Trust employees by developing work plans; monitoring performance and daily operations; completing performance reviews; and providing coaching and leadership.
- Cultivates ongoing member relations by presenting at various affiliate member conferences; speaking during relevant workshops and trade shows; and participating in Aim events as requested.

- Leads strategy and development of Trust marketing plan; oversees development of proposals for new business targets and renewal processes; and coordinating marketing strategy meetings.
- Leads strategic planning discussions, development and implementation of Trust marketing plan; directing planning and organizing of regional meetings, provide strategic vision during Trust finance and budget discussions; and, work with accounting team to ensure timely and accurate financial reporting.
- Sets the agenda for the Board of Trustees meetings, oversee the preparation of all meeting materials and information for said meetings, ensure all bylaws, resolutions, policies and practices as required by law are adopted by the Board of Trustees, and provide extensive leadership during meetings of the Board of Trustees.
- Participates in committee meetings including the Underwriting Committee, the Appeals Committee, the Administrative Committee, and the Wellness Committee.
 - Identify issues to be presented to governance and advisory committees for decisions regarding program offerings, and other subjects of concern, and prepare the required materials for discussion points at the appropriate meetings.

Required Job Skills and Abilities

Leadership and Management	<ul style="list-style-type: none"> • Highly skilled leader and manager of people and groups. • Demonstrates ability to create and implement goals, objectives and work plans in order to achieve Trust mission and vision. • Ability to effectively manage a variety of programs and issues with competing demands and time expectations and requirements. • Knowledge of non-profit management and governance.
Experience	<ul style="list-style-type: none"> • Local government knowledge, including insurance, risk management, finance, and other local government programs and services. • Knowledge of Human Resource laws, rules and regulations, and labor relations • Knowledge of basic accounting and finance practices. • Proficient in Microsoft Office (Excel, Outlook, PowerPoint, Word), and the use of technology in a variety of ways. • Skilled in designing and delivering presentations to a variety of large and small groups.
Industry Knowledge	<ul style="list-style-type: none"> • Knowledge of benefits, including deductibles, co-insurance, co-pays, and prescription formularies. • Knowledge of state and federal regulations regarding health and welfare benefits. • Knowledge of the HIPAA security requirements.
Commitment to Excellence	<ul style="list-style-type: none"> • Ability to keep sensitive and confidential material private. • Ability to model the organization's high standards of quality customer service to all current and prospective customers. • Ability to work cooperatively with staff, members and other groups and individuals to make effective decisions and to act independently in managing and coordinating assigned duties. • Ability to meet deadlines and complete assigned tasks in a timely manner. • Ability to plan, organize and prioritize multiple diverse work tasks for self and others. • Must possess a professional appearance and conduct for an office setting.

Working Conditions

The work is performed primarily in an office setting. The work involves sitting for extended periods of time and working with a computer, so there are repetitive motions with the wrists, hands and fingers. This position is exempt from overtime and should expect extended hours during certain times of year as necessitated by job responsibilities. Some travel and meetings with stakeholders across the State, including overnight stays, is required. Some national travel is also required.

Employment Requirements

- Master's Degree in Public Administration or Business Administration preferred; but combination of education, experience, and proven success in a similar role might be accepted.
- Significant management experience as a city manager, administrator, COO or Program Manager in a similarly sized business or nonprofit desired.
- Must possess or have ability to obtain valid Indiana State driver's license at time of employment.
- Must possess or have the ability to obtain a valid insurance broker's license from the Indiana Department of Insurance.