

Job Description for INSURANCE COORDINATOR

Introduction: The elected Officers and appointed Coordinators (3-year term) are the Board members of Southern California World Service, AFG, Inc., a California Nonprofit Public Benefit Corporation and a charitable 501(c)(3) tax-exempt entity per the Internal Revenue Service. The Coordinators act in accordance with the spiritual principles of Al-Anon Family Groups while conducting the duties of their position for the Area, mileage and expenses for which are reimbursed according to approved budget. The Coordinators accept additional demands on their time and possess some special skills relevant to their position. Members of Al-Anon in SCWS who also are members of A.A. are not eligible to hold Al-Anon service positions that vote in matters affecting another group or Al-Anon or A.A. as a whole.

1. **ELIGIBILITY / QUALIFICATIONS** – Active member of Al-Anon in CA(S) with good organizational skills and ability to pay attention to detail. Strong general computer and Internet skills. Experience working with computer databases. Ability to communicate via email. Working knowledge of the 12 Steps, Traditions and Concepts, current *Al-Anon/Alateen Service Manual* and Knowledge- Based Decision-Making (KBDM). Previous Group Representative (GR) and/or District Representative (DR) experience preferred, but not required. Has an understanding of the Area and World Service structure and SCWS Bylaws. Must maintain confidentiality of non-public information.
2. **OFFICIAL DUTIES / RESPONSIBILITIES**
 - Serves as primary contact between the Area, Area Group Records Coordinator, current insurance broker and carrier regarding individual group insurance.
 - Assist with negotiating annual renewal of all SCWS insurance policies and maintain a good working relationship with the client advisor at the insurance broker.
 - Review, analyze and make recommendations for the purchase of insurance policies as authorized by SCWS.
 - Submit a budget annually to the Area Treasurer.
 - Prepare a brief written report to be distributed at each Area meeting.
 - Submit expense reports to the Area Treasurer for all expenses in a timely manner.
 - Receive all insurance applications from groups whose facility requires a Certificate of Insurance (CI), completing the necessary forms required by the broker, confirm with Group Records that meetings requesting Certificates of Insurance (CI) are using correct WSO ID and are currently eligible prior to sending the request to the broker. Then when CI is issued, send an electronic copy to the Group's member listed in the CI application as the insurance contact in a timely manner to avoid delay for the groups; expedite requests from the broker or carrier when necessary. Be the point of contact if any claim must be made.
 - Send a copy annually of the renewed SCWS insurance policies to the Area Chairperson and arrange for a hard copy to be placed in the corporate files at the current location.
 - Other duties requested by the SCWS Assembly, SCWS or its Area Chairperson or other Officer as is reasonable.
 - By _____ (date to be determined) of each year ensure that the General Liability policy has been negotiated, the premium paid and the renewal posted. Negotiations may begin in November of the previous year.
 - By _____ (date to be determined) of each year ensure that the Area Directors & Officers policy has been negotiated, the premium paid and the renewal posted. Negotiations may begin 90 days prior to annual renewal date _____ (date to be determined).
 - Provides training at new DR and GR Orientations.
 - Prepare and present written report for each quarterly SCWS meeting and email to Secretary and Bulletin Editor.
3. **BASIC SKILLS / PERSONAL QUALITIES / EXPERIENCE NEEDED**
 - Strong computer and Internet skills. Internet connection.
 - Is accessible, available, responsive, and flexible.
 - Is able to communicate effectively, prepare written reports and meet deadlines.
 - Some form of electronic media suitable for transforming data/documents from one computer to another.
 - Able to remain patient and calm when interacting with Group members who may need extra education and/or guidance with understanding and completing all paperwork required to obtain a CI.
4. **ADDITIONAL SKILLS NEEDED** – Has a strong sense of responsibility, able to prioritize and work

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independently or as a team member.

5. **EQUIPMENT / TECHNOLOGY NEEDED** – Computer with Internet access, database software (provided by SCWS if needed). Working knowledge of virtual platforms, i.e., Zoom, GoToMeeting, etc. Telephone, printer and if possible a fax machine.
6. **ESTIMATED TIME COMMITMENT OF THIS POSITION** – 5-10 hours per week. Attends 8 SCWS meetings per year, 7-8 hours each, with a prepared report: Feb, Aug Committee (3rd Sat) and May, Nov Assembly (3rd Sat) and Jan, Apr, Jul, Oct Board (Sun). Attend the Annual SOS and support events of other Coordinators. See Mandatory Area Meeting Attendance table below. Insurance Coordinator does not hold any other office in SCWS (beyond the Group Level) as the time and demands of the position may be intensive.
7. **PREPARATION** – Become familiar with relevant and standard insurance terms and definitions, such as: liability, carrier, policy limits, deductibles, etc., and be able to explain these terms to members, as needed.
8. **TRAVEL** – May attend one service event outside SCWS Area during three-year term. Makes own travel arrangements, within budget guidelines.

NECESSARY AREA MEETING ATTENDANCE

SCWS Board	January, May, July, October	3 rd Saturday	9:00am to 3:00pm
Area World Service Committee (AWSC) + new DR Orientation two Saturdays before AWSC meetings	February, August	3 rd Saturday	9:00am to 4:00pm
Area Assemblies	May, November	3 rd Saturday	9:00am to 4:00pm
GR Orientation	May, November	1 st Saturday	XXXX
Sharing of Service (SOS)	January	3 rd Saturday	10:00am to 4:00pm
Longtimer's Event	Last year of 3-year panel	Saturday	10:00am to 4:00pm

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