I. POSITION SUMMARY: provides Unit Manager manages and directs all aspects of the unit to ensure department service standards are met, while independently performing the duties of a unit supervisor as outlined below. The Unit Manager Administrative Services Employee Benefits is a dual role combined with Account Executive, Senior Account Manager, or Account Administrator. Please refer to the related job description for roles and responsibilities. The Administrative Services Unit provides administrative and marketing support for the department. The Unit Manager is responsible for directing unit workflow to ensure client deliverables are completed accurately, efficiently, and on time.

II. INTRADEPARTMENTAL RELATIONSHIPS:

Reports to: Vice President, Director of Client Services
Supervises: Account Administrators (6-8)

III. BUDGETARY RESPONSIBILITY/STATISTICAL INFORMATION:

Makes recommendations and assists with annual budget preparation

IV. ESSENTIAL FUNCTIONS:

A. Supervisory
   1. Provides overall management of personnel related activities for assigned staff within the department, ensuring adherence to corporate human resource policies and procedures.
   2. Holds team members accountable for achieving their SMART goals and completing development plans. Works with team members throughout the year to ensure they making satisfactory progress.
   3. Manages unit priorities and account assignments; distributes work equitably throughout the unit taking advantage of talent resources and capacity within the unit.
   4. Coordinates with other Unit Managers to manage workflow and support projects across the units.
   5. Establishes priorities within the unit and monitors target dates to ensure timely completion.
   6. Coordinates communication between management, consultants, and staff.
   7. Evaluates staff’s job performance and training needs to identify development areas and support employee’s individual career paths.
   8. Establishes an atmosphere that promotes learning, initiative, and product knowledge while fostering talent development

B. Workflow/Training/Department Procedures
   1. Focus on new hire training program to ensure Account Administrators have a positive on-boarding experience.
   2. Evaluate employee training needs and opportunities both individually and department wide.
   3. Identify and implement improved workflow efficiencies.
4. Support detailed workflow documentation when needed.
5. Audit files and database for accuracy in order to identify training needs and make workflow recommendations for improvement.
6. Ensure assigned staff is following all policies and procedures, meeting established timelines, and maintaining quality standards.
7. Support maintenance and updating of presentation models including: cost sheet templates, proposals, RFP responses, presentations and other documents for the benefits department.
8. Support maintenance of agency management system and other databases to assist in client service and financial reporting.

V. MARGINAL FUNCTIONS:

1. Keep department team members informed about major account issues and problems.
3. Attend team and departmental meetings as scheduled.
4. Special projects as assigned.
5. Recommend and develop new initiatives as needed within the unit.

VI. POSITION QUALIFICATION REQUIREMENTS

A. Education/Training:
   High school diploma or general education degree (GED); some insurance related education or training; or equivalent combination of education and training.
   Bachelor’s degree (BA/BS); or equivalent combination of education and training preferred, but not required.

B. Experience:
   Minimum 5 years’ experience in the welfare benefits plan industry working for an employer, insurer/administrator, consultant, or broker.

C. Skills and Abilities which may be representative but not all inclusive of those commonly associate with this position:

   1. Apply principles of logical thinking to define problems, collect data, establish facts, and draw valid conclusions.
   2. Ability to read, analyze and interpret technical procedures and periodicals including professional journals, government regulations and rulings.
   3. Ability to write reports, business correspondence, and procedure manuals.
   4. Ability to effectively present information and respond to questions from groups of managers and employees, and on a one-on-one basis.
   5. Ability to interpret an extensive variety of technical instruction.
   6. Ability to accurately perform advanced mathematical calculations.
   7. Ability to understand fundamentals of healthcare financing and apply to work product.
   8. Effective time management skills including the ability to prioritize and organize workload.
   9. Ability to work effectively on a team and independently under general supervision.
   10. Ability to deal with problems involving several variables.
   11. Proficiency with Microsoft Office Suite of tools.
F. License(s)/Certification(s) Required:

Life/Health insurance license required. Industry certifications and/or designations preferred including CEBS, HIIA, etc.

G. On-The-Job Training Time:

Six (6) to nine (9) months.

H. Physical/Visual Activities or Demands: Physical/visual activities or demands that are commonly associated with the performance of the functions of this job.

While performing the duties of this position the employee is regularly required to sit, talk, hear, stand, walk, use hands to finger, handle, or feel, and reach with hands and arms. The employee is occasionally required to exert negligible physical effort continuously; up to 10 pounds. The vision requirements include close vision and ability to adjust and focus, ability to judge distance and space relationships, and identify and distinguish colors.

I. Work Environment: Environmental and atmospheric conditions commonly associated with the performance of the functions of this job.

Primarily normal office conditions; occasional exposure to weather conditions, dirt, dust, noise, and physical hazards when visiting remote locations. The noise level is quiet to moderate.

This job description in no way states or implies that these are the only duties to be performed by the employee occupying this position. Employees may be required to follow other job-related instructions and to perform other job-related duties as requested, subject to all applicable state and federal laws.

Certain job functions described herein may be subject to possible modification in accordance with applicable state and federal laws.

"Commonly associated" is not intended to mean always or only. There are different experiences that suggest other ways or circumstances where reasonable changes or accommodations are appropriate.

All activities, Demands, Conditions and Requirements are linked to Essential Job Functions unless marked with an asterisk, which denotes linkage only to marginal function(s).

____________________________________  _____________________
JOB HOLDER       DATE

____________________________________  _____________________
SUPERVISOR       DATE

____________________________________  _____________________
HUMAN RESOURCES      DATE