

**COMPETENCY MODEL FOR  
RISK AND INSURANCE ASSISTANT  
CLASS CODE 1645**

The following competencies have been identified as those that best separate superior from satisfactory job performance in the class of **RISK AND INSURANCE ASSISTANT**. (Numbers refers to the order of competencies in the Competency Bank.)

- 4. Analytical Ability
- 6. Attention to Detail
- 7. Self Management
- 20. Job Knowledge
- 29. Fact Finding
- 33. Interpersonal Skills
- 34. Customer Service
- 45. Oral Communication

On the following pages are descriptions of each competency, including a definition, the level of the competency required for the class (*italicized*, **bolded**, and underlined), examples of behavioral indicators, and satisfactory and superior performance levels.

**4. ANALYTICAL ABILITY** – Identifies, obtains, and evaluates relevant information to establish relationships or patterns, cite causes, and reach logical conclusions.

Level of Competency Required by Job:

Level 1: Recognize similarities/differences in current situation to those previously encountered and is guided accordingly. Apply existing policies correctly. Ask pertinent questions or otherwise seek additional information to formulate appropriate response.

**Level 2: Consider multiple, varied factors when evaluating a situation or issue. Seek additional information to provide further insight. Reach conclusions that logically follow from the information obtained.**

Level 3: Consider a multitude of diverse factors, their interrelationships, the perspectives of others, alternative courses of action and their likely ramifications when evaluating information to reach a conclusion.

Examples of Behavioral Indicators:

- Obtains the necessary amount of relevant information.
- Recognizes the impact of each type of information on conclusions.
- Evaluates the quality/source of information when considering it.
- States the shortcomings of the information and, therefore, the analysis.

Performance Levels:

Satisfactory

Recognizes available relevant information, seeks additional information to consider, and reaches a conclusion. Provides sound, convincing justification for conclusions, citing relevant data and facts.

Superior

Uses a great deal of existing and obtained information and data to develop and evaluate alternatives and arrive at a final conclusion. Provides compelling arguments in support of conclusions.

**6. ATTENTION TO DETAIL** – Extremely careful in addressing all aspects of each work assignment in order to produce “completed staff work” and/or avoid any negative outcomes.

Level of Competency Required by Job:

Level 1: Ensure all aspects of work assignment are completed as directed.

**Level 2: Verify that each aspect of work assignment is properly completed; make logical inference regarding additional activities that may need to be performed to produce “completed staff work.”**

Level 3: Include evaluation of final work/work product in its accomplishment; make adjustments as possible to improve.

Examples of Behavioral Indicators:

- Carefully checks all aspects of work for completion and accuracy before submitting.
- Identifies errors (for example, typo's, computations, measurements, application of laws/rules/policies) and corrects them prior to submitting.
- Cross-checks work against available resources.
- Sets up a means of checks and balances to ensure work accuracy.
- Considers changes in final work product to ensure usability by recipient.
- Completes all revisions upon request.

Performance Levels:

Satisfactory

Ensures that each task accomplished represents “completed staff work.” No remaining details/inconsistencies for others to address.

Superior

All aspects of each task completed are verified to be correct. Identifies any foreseeable consequences of work that may need to be addressed and does so.

**7. SELF MANAGEMENT** – Organizes and plans for task accomplishment; manages time and works diligently to complete assigned work/fulfill responsibilities.

Level of Competency Required by Job:

Level 1: Order tasks for efficient performance; maintain awareness of time allotted and deadlines in order to ensure they are met.

Level 2: Plan and perform work in a way that maximizes efficient performance; establish and adjust priorities to ensure timely completion of most critical assignments.

**Level 3: *Allot time to responsibilities proportional to their prominence, priority, and impact.***

Examples of Behavioral Indicators:

- Performs only work activities during work hours.
- Alters means of performing work when original approach proves to waste time.
- Keeps a “to do” list (with indication of priority and deadlines, if necessary).
- Requests assistance as necessary when it becomes clear that work will not be completed on time.
- Demonstrates a record of progress with respect to all assignments/responsibilities.
- Uses optimal means of communication for efficiency and effectiveness.

Performance Levels:

Satisfactory

Conducts self while at work in a manner that ensures work will be completed as scheduled, or provides explanation or secures assistance or adjustment of schedule if it will not be.

Superior

Seeks efficiencies in doing work to maximize productivity. Plans work carefully and follows the plan or makes adjustments if it is disrupted. Maintains personal responsibility for all work accomplishment.

**20. JOB KNOWLEDGE** – Knows information required to perform a specific job. Includes both widely available courses of study (for example, chemistry, human resources management, graphic arts) and City-specific information (parking regulation and ticketing practices; purchasing procedures; provisions of the City Charter).

Level of Competency Required by Job:

Level 1: Knowledge is concrete, factual, and/or procedural and may be defined by the organization. Situations in which it is applied are quite consistent.

**Level 2: Knowledge is substantive and may be defined by an external trade, field, or profession. Situations in which it is applied vary and, as such, require breadth and depth of understanding.**

Level 3: Knowledge is abstract, conceptual, and/or complex and may be supported by a well-defined academic discipline or authoritative sources (e.g., laws, ordinances, government guidelines/regulations/codes). Situations in which it is applied may vary greatly or be novel.

Examples of Behavioral Indicators:

- Performs work correctly/avoids technical (job content related) errors.
- Answers technical questions about work accurately.
- Asks few technical questions about the performance of routine work activities.
- Offers advice (“coaching”) to new employees regarding their work.
- Develops training programs for other employees.
- Sought out as a source of information by others.

Performance Levels:

Satisfactory

Sufficient job knowledge to perform work correctly independently. Answers technical questions about work correctly.

Superior

Expertise in technical job information sufficient to serve as a resource to others. May develop training manuals/programs and/or give internal and/or external presentations related to work.

## **Job Knowledge Areas**

1. Knowledge of various types of bonds and insurances and their associated documentation, including the purpose, use, and contents of each sufficient to determine the appropriate type of bond and/or insurance required to process documentation and ensure content is correct based on the necessary type of bond and/or insurance.
2. Knowledge of common risk and insurance terminology such as claims, surety bonds, commercial general liability insurance, and commercial automobile insurance sufficient to understand the framework of the risk and insurance industry and accurately communicate risk and insurance related information to customers, vendors, and/or management.
3. Knowledge of the procedures used to review, issue, and process insurance and/or bond documentation including an ACORD 25 form and ACORD 27 form sufficient to ensure documentation is in compliance with industry standards and formatting.

**29. FACT FINDING** – Obtains required information through questioning, review of existing materials, or securing new materials to answer a question or address a problem.

Level of Competency Required by Job:

Level 1: Look up information available in the workplace (including use of the internet) or by asking questions of co-workers or supervisor.

**Level 2: Interview individuals and/or obtain necessary information from files, the library, and/or the internet.**

Level 3: Conduct in-depth interviews/interrogations or depositions. Locate obscure reference material containing germane information by correctly identifying needed information, making logical inferences regarding where it might be available, and discerning from newly acquired information relevant additional materials.

Examples of Behavioral Indicators:

- Asks a series of insightful questions in a logical order.
- Correctly identifies persons most likely to have the needed information.
- Listens carefully to responses from others to discern all relevant information stated.
- Makes logical assumptions about where certain types of information might be found; or asks others who are likely to know.
- Persists in locating relevant information until a sufficient amount is available to permit answering question or addressing the problem fully.

Performance Levels:

Satisfactory

Obtains necessary information through scrutiny of existing files and other resources, correctly identifying and obtaining other sources of information, and/or asking questions.

Superior

Exhibits great insight in identifying who would have certain information, or in what materials it might be located. Carefully crafts questions to extract needed information. Persists until sufficient information is gathered to formulate a logical conclusion.

### 33. INTERPERSONAL SKILLS – Interacts effectively and courteously with others.

#### Level of Competency Required by Job:

Level 1: Interact with members of the workgroup, supervision, and/or the public in a cordial, service-oriented manner.

**Level 2: Interact across department lines and with appointed City officials, and/or members of the public, at times under adversarial circumstances, in a cordial, respectful manner.**

Level 3: Interact with appointed and elected City officials, department heads, representatives of external organizations, and/or the media in a cordial, effective manner.

#### Examples of Behavioral Indicators:

- Works well with others toward mutual objectives.
- Does not arouse hostility in others.
- “Disagrees without being disagreeable.”
- Elicits acceptance/cooperation from others.
- Affords all individuals respect, regardless of their role or status.
- Effectively addresses concerns of politicians or others who may have their “own agenda.”

#### Performance Levels:

##### Satisfactory

Behaves in a courteous, respectful, cooperative manner toward co-workers, other City employees, and members of the public.

##### Superior

Facilitates positive interpersonal relations within/among workgroups and toward members of the public. Adept at finding similarities and grounds for cooperation/mutual benefit.

**34. CUSTOMER SERVICE** – Interacts with recipients of services (internal or external customers) in a way that provides accurate, timely, and effective information and service.

Level of Competency Required by Job:

Level 1: Interact with customers in person, over the telephone, or through e-mail (and/or other electronic media) in order to provide information or assistance. Listen to customer concerns; explain/reconcile information and provide alternatives if possible; facilitate resolution by making referral and/or following-up as necessary.

**Level 2: Promotes positive customer service. Serves as a model of providing exemplary customer service.**

Level 3: Develop customer-oriented procedures; identifies changes in procedures to enhance customer service and ensures they are implemented.

Examples of Behavioral Indicators:

- Carefully listens to (or reads) customer statement of the issue.
- Provides direct, informative, accurate responses to customer.
- Suggests options if available.
- Maintains a positive attitude in the face of customer complaint or frustration.
- Remains focused on the issue presented by the customer and directs the customer back to the issue if necessary.
- Asks the customer if their concerns have been fully addressed.
- Ensures organizational policies and practices are customer-focused.
- Ensures all employees recognize their responsibility for customer service and are properly trained for it.

Performance Levels:

Satisfactory

Displays knowledge as well as courtesy and patience when interacting with customers. Ensures customers' issue is correctly identified and remains focused on it until it is resolved.

Superior

Seeks further information or advice to resolve difficult issues. Solicits feedback on the effectiveness of service. Makes suggestions for improving service and facilitates changes needed to implement.

**45. ORAL COMMUNICATION** – Communicates orally in a clear, concise, and effective manner.

Level of Competency Required by Job:

Level 1: Exchange specific, job-related information orally with others in the immediate work environment or via telephone and/or radio.

**Level 2: Obtain/provide/present general and/or job-specific information orally to a variety of others in various situations.**

Level 3: Obtain/provide/present a diverse array of information orally at varying levels of complexity to a wide range of others across many different situations and circumstances.

Examples of Behavioral Indicators:

- Audience clearly understands the intended message.
- Rarely must repeat information in response to questions.
- Refrains from use of unnecessary words, phrases, or jargon.
- Provides a level of detail appropriate to the situation (avoids too much or too little detail).
- Speaks at a level appropriate to the audience in terms of terminology, sentence structure, and simplicity/complexity of ideas expressed.
- Uses words with precision (vocabulary) to convey exact information.

Performance Levels:

Satisfactory

Speaks clearly and audibly, providing the appropriate information and level of detail. Typically conveys the message on the first attempt. Answers questions accurately and directly.

Superior

Speech is direct and to the point. Speaks convincingly and with authority when appropriate. Maintains sensitivity to the audience while providing thorough information with the appropriate level of detail through the use of precise language.