Northern California World Service Area
Insurance Coordinator Guideline

PURPOSE:
• To maintain the insurance policies required by NCWSA and process applications from groups and districts not otherwise covered to issue an Evidence of Insurance (EI) certificate for groups or special events at no cost to the applicant. (i.e. DIA, fund raisers, workshops and conventions). These policies include but are not limited to "General Liability" (GL) and "Director and Officers" (D & O).

PREREQUISITES, REQUIREMENTS, SKILLS OR TALENTS NEEDED:
• Be organized and able to keep accurate records.
• Some familiarity with insurance is helpful but not required.
• Have a Service Sponsor who attends Al-Anon regularly and guides me in appropriate responses and behavior.

DUTIES:
• Negotiate annual renewal of all insurance policies and maintain a good working relationship with the client advisor at the insurance broker.
• Receive all applications (See Appendix A, forms A26a and A26b) for EI certificates completing the necessary forms required by the Broker, sending the request to the Broker; and when issued, send an electronic copy to the applicant.
• Process applications and issue EI certificates in a timely manner to avoid delay and anxiety for the applicant. A seven days turn around is a realistic expectation/suggested, expediting requests from the Broker or Carrier when necessary.
• Send a copy annually of the renewed insurance policies to the Chairperson and arraign for a hard copy to be placed in the corporate files at the current location.

RESPONSILITIES:
• Review, analyze and make recommendations for the purchase of insurance policies as authorized by NCWSA.
• Submit a budget annually to the budget committee.
• Attend all meetings of NCWSA and NCWSC and prepare a brief written report to be distributed at each meeting.
• Submit expense reports to the treasurer for all expenses in a timely manner but no later than the end of the fiscal year.
• Other duties requested by the NCWSA Assembly, NCWSC or its chairperson or other officer as is reasonable.

TIME LINE:
• By February 6th of each year ensure that the GL policy has been negotiated, the premium paid and the renewal posted. Negotiation may begin in November of the previous year
• By September 18th of each year ensure that the D & O policy has been negotiated, the premium paid and the renewal posted. Negotiation may begin in June.
AMOUNT OF TIME PER MONTH, YEAR or TERM REQUIRED:
- Friday evening, all day Saturday and Sunday once a year in the Fall to attend Assembly.
- All day Saturday and Sunday once a year in the Spring for a combination Assembly and NCWSC meeting.
- Friday evening and all day Saturday to attend two (2) NCWSC meetings annually.
- 2-3 hours per month to process insurance certificates.
- 2-4 hours twice a year to negotiate renewal of insurance policies.

EXPENSES:
- Travel, meals and housing for attendance at all NCWSA Assemblies and NCWSC meetings or if required for other events at the direction of the Chairperson or Delegate.
- Any supplies, printing, copying and other office supplies necessary to satisfy the requirements of this position.

EQUIPMENT NEEDED:
- Internet connection and computer for producing printed documents.
- Telephone, printer and if possible fax.
- Some form of electronic media suitable for transforming data/documents from one computer to another.

FORMS USED:
- A26a Insurance Certificate Application and A26b Special Events Insurance Application.
- All forms supplied by the insurance broker necessary to process applications for certificates.
- A04 or A06 to receive compensation for approved expenses.

OTHER INFORMATION:
- Suggest that the Coordinator and Alternate not hold any other office in NCWSA as the time and demands of the position can be time and labor intensive.
- Suggest having a Service Sponsor who has past experience with the position and its responsibilities.
- A division of responsibilities between the Coordinator and the Alternate Coordinator is helpful.