

Position Description

Employer: Reta Trust

Title: Executive Director

Reports to: Reta Board of Trustees

Supervises: Assigned Gallagher Benefit Services team.
Actively manages the GBS management contract with no direct reports

Purpose: Provide vision, leadership, and direction for the Reta Trust. Focuses on governance, Catholic Directives, administration, financial performance, marketing & sales, benefit costs, administrative costs, customer service, and vendor relationships.

Essential Functions:

1.
 - A. Collaborates with the Board to formulate short & long term strategies.
 - B. Support all Board & Board Committee functions including meeting agenda formation and implementation of Board decisions.
 - C. Communicates with Board, Committees, and Trustors on all policy and major operating issues.
 - D. Interfaces with Bishops and Religious Communities as needed.
 - E. Represents Reta to governmental agencies.
2. Deep appreciation of the values and goals of the Catholic Church. Coordinate with subject matter experts to maintain & update Reta's Ethical & Religious Directives Program.
3. Special emphasis on prudent financial management through efficient & effective administrative services, most favored nation contracts, leading edge Wellness programs, and an Investment Policy consistent with Socially Responsible Investments.
4. Actively participate in the marketing & sales effort. Responsible for all of Reta's core programs so that the Reta product is the most attractive health insurance solution for the Catholic Church.
5. Actively manage & integrate vendor contracts with a focus on health plans, TPA services, management services, actuarial services, legal counsel, financial back office services, and investment consultants.

Essential Leadership & Management Competencies:

1. Leadership, communication, and interpersonal skills including:
 - a. Effective and comfortable interaction with all levels of lay and ecclesial personnel within various Catholic entities.
 - b. Instilling teamwork, motivation, and the development of others.
 - c. Ability to understand, formulate strategies, and lead change.
2. Experienced in Board governance, including leadership in the development and implementation of strategic initiatives that promote affordable, quality health insurance.
3. Ability to understand and promote the Reta culture, including recruitment of Board & Committee members, and communication of that culture to prospective Trustors.
4. Maintain a culture of continuous improvement, accountability, problem-solving, decision making (at a detailed level when necessary), and healthcare financial expertise.
5. Provide customer oriented administrative services thru best in class vendor relationships.
6. Treats all information and data with appropriate confidentiality and security.

Qualifications & Skills:

Relevant Health care/health insurance experience (15 years plus) in multiple disciplines. Ability to manage in a complex organizational structure.

Knowledge of employee benefits issues and practices including:

1. Health insurance expertise with a focus on self-insured medical, dental, and vision products, and how those products interact within a large risk pool.
2. Effective implementation and management skills for strategic and administrative initiatives, with the ability to simultaneously manage multiple variables and projects.
3. Ability to resolve legislative and regulatory issues.
4. Ability to provide Catholic benefits in a constantly changing industry.

5. Client focus with a strong understanding of the needs of the Catholic Church.
6. Familiarity with federal and state mandated benefits as well as legislative, regulatory, and legal issues.
7. Superior written and oral communication skills including the ability to compose and/or communicate highly technical information in a clear and concise manner.
8. Leadership skills, initiative, and problem solving.
9. Strong negotiation skills.
10. Able to manage conflict constructively.
11. Well-groomed and professional appearance.
12. Comfortable with change and solving all issues that present themselves.

Relationships:

High visibility and impact with Board, Trustors, staff, key vendors, and prospective new Trustors.

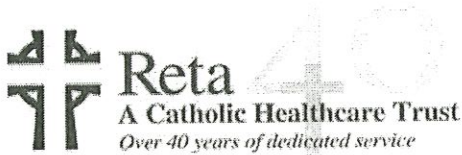
John Stein

From: John Stein
Sent: Monday, July 17, 2017 1:27 PM
To: Rob Geyer
Subject: FW: position description
Attachments: Position Description.docx

Hi Rob,

Re: Position description. See attached.

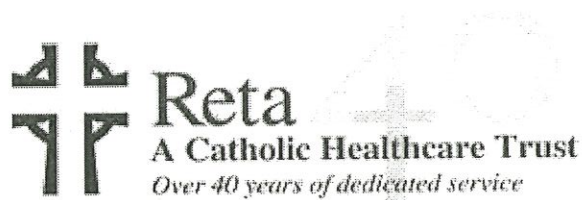
John D. Stein | Executive Advisor



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