



**Position Descriptions for  
Underwriting, Claims,  
Rehabilitation, Product  
and YALUCA Group**

**Chair**

## ROLE:

Chair of the

- ALUCA Underwriting Group – Voluntary Role
- ALUCA Claims Group – Voluntary Role
- ALUCA Rehabilitation Group – Voluntary Role
- ALUCA Product Group – Voluntary Role
- YALUCA Group – Voluntary Role

(Expected level of commitment per month: 8 - 12 hours - quieter in December and Jan each year)

## POSITION OVERVIEW:

This volunteer role is responsible for the leadership and execution of ALUCA's volunteer activities across the **Underwriting or Claims or Rehabilitation or Product or YALUCA** Group. This is a pivotal role in helping to ensure that ALUCA can achieve its mission and vision.

## REPORTS TO:

The ALUCA National Chair, Board and CEO.

## KEY ACTIVITIES and RESPONSIBILITIES:

As a key partner to the ALUCA National Board, CEO and National Team, the **Underwriting or Claims or Rehabilitation or Product or YALUCA** Group Chair will provide leadership to this important Functional Group.

The **Underwriting/Claims/Rehabilitation/Product/YALUCA** Group Chair will support and sustain the work of ALUCA and provide the appropriate governance, leadership, and strategic support to the functional group.

### Their specific responsibilities include:

- Developing a plan of deliverables (output) for the calendar year (webinars, papers, in-person events) that align with ALUCA's competency framework and CPD planner; ensuring proposed content is fit for purpose, educational, responsive to industry change and development needs of members; gaining signoff from the Board Content Steering Committee at the beginning of each calendar year
- Ensuring the **Underwriting/Claims/Rehabilitation/Product/YALUCA** Group adheres to the constitution and rules of ALUCA
- Being a trusted advisor to the National Board and CEO as they implement ALUCA's Strategic Plan
- Providing subject matter claims expertise across the suite of ALUCA programs and activities as required e.g. Education Group, Skills pathway program etc.

- Recruiting, onboarding and orientating new Group members to ALUCA in conjunction with ALUCA's national team
- Developing and managing strong relationships with fellow Claim Group, Underwriting Group, Rehab Group, Product Group and YALUCA Group members and other ALUCA Working Group members and Chairs, volunteers, partners, and other stakeholders
- Helping to drive the uptake of ALUCA's accredited membership Certified Professional Life Insurance (CPLI) program amongst the life insurance community and ALUCA members
- Approving any group decisions in consultation with ALUCA's Chair or CEO, meeting all legal and fiduciary responsibilities of our association including keeping and reporting accurate minutes of all meetings held and providing copies of these notes to ALUCA's national Board.
- Delegating appropriate tasks to individual **Underwriting / Claims / Rehabilitation / Product / YALUCA** Group members
- Managing and supporting group members in their roles and helping them assess their performance against their responsibilities.
- Supporting ALUCA events by volunteering time and expertise on an as needs basis e.g. Awards Night, Conference
- Acting as an ambassador for the organization

### Functional Group Commitments

- Ensure adequate Chair and Group succession planning
- Ethically and responsibly promoting ALUCA
- Act in accordance with the ALUCA Code of Conduct.

### TERM of POSITION:

ALUCA Groups are not member elected positions, and as such ALUCA's Board set the terms of the Group positions. Each Chair is appointed by the Board and will be appointed for a term of up to 3 calendar years pending their performance.

### TECHNICAL SKILLS, KNOWLEDGE, and QUALIFICATIONS:

#### UNDERWRITING

- Demonstrated relevant underwriting experience in the Life Insurance industry with a minimum of 5 years of experience including leadership experience

#### CLAIMS

- Demonstrated relevant claims experience in the Life Insurance industry with a minimum 5 years of experience including leadership experience

### REHABILITATION

- Demonstrated relevant rehabilitation experience in the Life Insurance industry with a minimum 5 years of life insurance experience including leadership experience

### PRODUCT

- Demonstrated relevant product experience in the Life Insurance industry with a minimum 5 years of experience including leadership experience

### COMMON QUALIFICATIONS and KNOWLEDGE

- People leadership experience – minimum 3 years
- In line with ALUCA's competency framework, we expect the individual's competency to be at a 'Level 3' *Advanced* or 'Level 4' *Expert* level of competency as a **Underwriting/Claims/Rehabilitation/Product** individual
- Preference will be provided to ALUCA CPLI accredited members. If currently not a CPLI accredited member, willing to become one (this requires both educational qualifications and 5+ years Life Insurance experience)
- Demonstrated track record of building positive relationships and credibility within the Life Insurance community
- Diplomacy skills and a natural affinity for cultivating strong working relationships with demonstrated skills in facilitating, negotiation and the ability to build consensus among a diverse group of individuals
- Excellent written and oral communication skills coupled with a natural affinity for public speaking
- Personal qualities of integrity, credibility, honesty, as well as a passion for
- improving the life insurance industry and alignment with ALUCA's value.