



Chief Operating Officer (COO)

Leadership Profile

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Organization Overview

The American Insurance Trust (The Trust) was established as a formal entity in 1962, as a business trust under District of Columbia law. Its mission is "to provide insurance and other financial security products to meet the unique needs of psychologists, allied health professionals, health care organizations and groups, and other healthcare professionals."

The Trust has long been a leading provider of expanding insurance and risk management programs for psychologists, psychology students, and related individuals in the United States. Our insurance programs include The Trust Sponsored Professional Liability Program and Business Office Insurance; financial security programs offering Life, Disability, Office Overhead, and Auto and Home Insurance; Directors and Officers Insurance; Cyber Enterprise Risk Management Protection; Pet Insurance; and other programs such as Long-Term Care Insurance and Retirement Planning Services. Our risk management programs include The Advocate 800 Program's consultation service, Ethics and Risk Management Continuing Education Workshops and Webinars, and independent learning publications.

The Trust's wholly owned subsidiary, Trust Risk Management Services, Inc. (TRMS), acts as Broker and Administrator for The Trust's Professional Liability, Business Office, and Directors and Officers lines of insurance. Brokerage and administration services include policy underwriting, issuance, and lifecycle management; customer service; and technical services. TRMS is fully licensed to do business in all jurisdictions.

TRMS has its own Allied Healthcare Professional Liability Insurance Program which offers very competitive professional liability insurance coverage to Allied Healthcare Professionals in more than 120 professional classes, including Counselors, Social Workers, Marriage and Family Therapists, Audiologists, Employee Assistance Professionals, Play Therapists, Occupational Therapists, Physical Therapists, Speech Therapists, and many more. This program also offers Student Liability, Business Office, and Directors and Officers Insurance to Allied Healthcare Professionals.

The Trust works with highly rated insurance companies to underwrite its insurance programs. The Trust Sponsored Professional Liability, Business Office and Cyber Enterprise Risk Management Protection Insurance Programs are underwritten by ACE American Insurance Company. In 2016, ACE acquired Chubb, creating the world's largest publicly traded property and casualty insurance company, and adopted the Chubb name. The suite of financial security programs offering Group Term Life, Income Protection (Disability) and Office Overhead is underwritten by Lincoln Financial Group; Auto, Home and Renters Insurance; and Pet Insurance is underwritten by Liberty Mutual; Long Term Care Insurance is brokered through Burling Insurance Group; and Retirement Planning Services are provided by UBS.

The Trust program is continually monitored by the Trustees – psychologists experienced in both practice and insurance needs, and independent insurance experts – to ensure that coverage is broad and meets the ever-changing environment in the discipline and profession of psychology.

Chief Executive Officer

John W. Davison, Ph.D., MBA



Dr. John Davison received his Ph.D. in Clinical Psychology along with an MBA degree from Auburn University. He completed his clinical training and early practice as a psychologist with the Department of Veterans Affairs (VA) at VA Puget Sound Healthcare System in Seattle, Washington. He then joined the headquarters staff at VA Central Office, where he was the Associate Director for Behavioral Public Health and continued to provide clinical care at the Washington DC VA Medical Center.

After three years as a Lead Associate with the consulting firm Booz Allen Hamilton, Dr. Davison became the Chief of Behavioral Health at the Defense Health Agency (DHA) where he led the revision of the \$1.4 billion TRICARE Mental Health Care benefit, resulting in mental health parity and improved access to care for 9.6 million beneficiaries. Dr. Davison's most recent assignment was the Chief of the Integrated Clinical Operations Policy Support Branch in the DHA Medical Affairs Directorate, where he implemented a system-wide clinical communities model to advance clinical process improvement and standardization in healthcare delivery. He also achieved \$8.5 million in Defense Health savings through streamlining and consolidation of programs.

Dr. Davison's practice experience includes provision of evidence-based psychotherapy for PTSD and other disorders; psychological assessment of law enforcement and public safety job candidates; and consultation to private companies and municipal agencies regarding personnel assessment and selection for managerial and executive positions. In his career, Dr. Davison has served as the Co-Chair of the DoD/VA Health Executive Council's Psychological Health Workgroup; the DoD Co-Lead for President Obama's Mental Health Interagency Task Force; and the DoD ex-officio member of the National Institute of Mental Health (NIMH) National Advisory Mental Health Council.

Position Summary

Reporting Relationships

The COO reports to the Chief Executive Officer with a dotted line to the Deputy Director of Strategic Planning and Resource Development. Direct reports include the Assistant Vice President of Insurance Strategy, Operations and Enterprise Risk Management; Senior Assistant Vice President of Marketing and Creative Design; Assistant Vice President of Information Technology (IT) Infrastructure; and Assistant Vice President of IT Compliance and Project Management.

The COO is responsible for using a broad knowledge of insurance and regulatory frameworks to create and support continuous business growth based on a business/marketing plan which is consistent with the Companies' strategic plan. Additionally, the COO will provide oversight and direction of the daily functions for Operations, Marketing and IT. The COO will provide the leadership, management, and vision necessary to ensure appropriate controls are in place for operating efficiency. Manages the corporate Enterprise Risk Management (ERM) and Business Continuity program.

Responsibilities

The successful COO candidate will:

- Maintain an understanding of the Companies' internal operations, setting the direction and evaluating how changes must occur within the staff to support stability and growth consistent with the Strategic Plan for Operations, Marketing and IT.
- Regularly reviews, tests, and adjusts Enterprise Risk Management/Business Continuity Plans; performs risk assessments, analyzing current risks and identifying potential risks that are affecting the Company.
- Designs and implements an overall risk management process for the Company that could include an analysis of the fiscal impact on the Company when risks occur; creates business continuity plans to limit risks to the Company.
- Review insurance products and services offered by The Trust Companies, ensuring they are appropriately targeted and recommend expansion of product lines based upon competitive needs and the needs of Trust constituents.
- Recommend enhancements, cost containment features and overall plan design for existing and new products, reviewing actuarial and all data to identify threatening financial signs emanating from pricing or experience of existing product lines.
- Serve as a negotiating partner and as an escalation point for staff internally as well as between staff and carriers, brokers, and/or third-party vendors.

- Work with marketing personnel to identify competitive benefits to highlight in promotions and ensure professional and innovative strategies.
- Ensure that quality leadership and management is maintained with effective training and mentoring in departments for which has oversight.
- Assist the CEO and Deputy Director in overseeing, managing, and evaluating the performance of some members of the senior leadership team as directed.
- Manage and implement short- and long-range departmental/staff goals, objectives and operating procedures for Operations, Marketing and IT.
- Enhance and/or develop, implement, and enforce policies and procedures that will improve the overall operation and effectiveness of the Operations, Marketing, and IT Departments.
- Provide support for the CEO and Deputy Director regarding communication with staff members and outside contacts, acting when needed as a representative of the CEO's and Deputy Director's office for greater accessibility.
- Participate in projects as assigned by the CEO and Deputy Director.

Goals and Objectives

The following goals and objectives have been identified as priorities for this position:

- Successfully establish trust and credibility as a leader, an expert in successful operations' performance and measurement, and insurance and compliance.
- Design and execute an operations strategy which is well organized and functions effectively for the company. The goal will be for insurance operations to be viewed as a credible and valued internal resource for the organization and externally with our vendors.
- Assure that all operations are provided at a high level of service; that audits are at least Satisfactory; and that departments for which the COO has oversight demonstrate collaborative, responsive, business focused, and problem-solving actions and behaviors.
- As a member of the senior executive management team, model integrity, dedication to success of the Company, and a good work ethic, and be viewed as a team player, problem solver, and resource to others.
- Become familiar with and promote The Trust culture and organizational structure.
- Establish relationships within the business community, insurance industry, and with vendors.
- Frequently interact one-on-one with team members, provide group educational presentations, and lead teams, multi-service, and organization projects.
- Adapt and respond to organizational needs, current responsibilities, and changing priorities.
- Work with the Deputy Director to develop, track, and evaluate the strategic plan to enhance company operations.
- Provide expertise in insurance, risk management, professional liability, and malpractice.

Candidate Qualifications

Education/Certification

- Master's Degree in Business Administration (MBA) is preferred.
- Property and Casualty License is preferred.

Experience/Skills:

- Possess a minimum of eight to ten years of corporate business development and management, marketing, and insurance industry experience, to include the areas of reinsurance, professional liability, compliance, and underwriting, preferably at the C-suite level.
- Demonstrated success in driving change, developing, advocating, and implementing new ideas, methods and approaches.
- Demonstrated ability to produce and deliver complete, timely, and professional proposals.
- Demonstrated knowledge of daily operations of an insurance organization.
- Demonstrated negotiation skills, including strong closing skills; sound analytical abilities and good judgment; effectively deal with ambiguity.
- Recognized leadership skills and management techniques, including results through effective team and individual performance, setting clear goals, and managing accountability.
- Excellent written and verbal communication skills, that include listening, facilitation, conflict resolution, negotiation, and influence both internally and externally with people at all levels of an organization.
- Strong attention to detail coupled with the ability to make decisions in a timely manner.
- A person of unquestioned integrity and moral character; an individual that the institution and the community can trust without reservation.
- An individual who can serve as a confidant and close advisor to Trust Companies' leadership.
- A confident executive who values relationships with staff, peers, and superiors equally.
- A well-organized and self-directed individual with the ability to adapt quickly to changing dynamics and concerns. Must be "politically savvy" and a team player.
- Strong team player skills with a track record of working collaboratively with a highly professional team.
- Proficiency with MS Office Suite, Outlook, internet.

Competencies:

- Work is normally performed in an office environment, with extended hours as necessary.
- Work outside of business hours and overnight travel may be required.
- This position requires the ability to remain seated for up to seven hours every day.
- Ability to perform keyboarding tasks on a consistent basis.

The Community

Rockville, Maryland

Nestled in central Montgomery County, Rockville, MD is regarded as one of America's leading small cities for work, play and life. It is the vibrant, highly educated, business-friendly home to some of the nation's and the world's most prominent biomed and technology companies and is adjacent to the world's most powerful city, Washington, D.C.

Rockville is a city that remembers and reveres its roots, its commitment to citizen-centric public service, to the planet and to the connectivity of its neighborhoods and residents. Rockville is a Maryland city near Washington, D.C. Restaurants and shops are clustered around Rockville Town Square, with its lawn and seasonal ice-skating rink. The grounds of the early-1800s Beall-Dawson House include the Stonestreet Museum of 19th-Century Medicine. Civic Center Park has gardens and trails. Northeast, in Rock Creek Regional Park, Meadowside Nature Center has nature and culture exhibits.



Rockville is a place one can truly and proudly call "my hometown." It is a place that looks and feels like home, where people and government work to maintain the intimacy and warmth that "hometown" connotes. A place where, despite our differences, neighbors know and care about each other and the community they share.

Although Rockville, MD, has been around for a long time, it wasn't until the 1950s that it began to boom. Today, this Montgomery County city is home to numerous neighborhoods, including West End, where you can find beautiful historic houses, and Rockville Town Square, which is conveniently located just two blocks from the Rockville Metro station.



Rockville real estate is perfect for anyone who wants to live relatively close to D.C. but would still like to enjoy a suburban lifestyle. This city enjoys easy access to the Beltway and also to I-270. In addition, Rockville has two Metro stations, Rockville and Twinbrook, so it's easy to get to D.C. when you want to. There is also a train station, so hopping aboard Amtrak or a MARC train is another convenient option for commuters.

Outdoor enthusiasts enjoy living in Rockville. This city has a number of parks and recreational facilities, including the 120-acre Croydon Creek Nature Center, which is an urban wildlife sanctuary. At 528 acres, Cabin John Regional Park is one of the biggest parks in Montgomery County; you can find an ice-skating rink, dog park, miniature ride-on train, and even a Tai Chi court in this park. Plus, its Shirley Povich Field is the home ballpark for Georgetown University's baseball team.

The city of Rockville proudly hosts many seasonal events, including an Independence Day celebration and a Lunar New Year celebration. These special touches make Rockville particularly attractive to potential home buyers.

Procedure for Candidacy

Please direct all nominations and resumes to Toni Davis, preferably via e-mail, to tdavis@wittkieffer.com.

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