



## **First Year CUNA Management RM Session Benefits at a Glance!**

**Fact... Your Credit Union Must Take Risks if it's going to grow, prosper, and provide meaningful member services.**

- **We'll First Review RM Fundamentals, Principles, and Methods. Did You Complete the 1<sup>st</sup> Your RM Benchmarking Survey?**
- **You'll learn to...Identify, Measure, and Control pure (they only cause losses) and speculative (you hope to gain but could suffer a loss) risks!**
- **We'll focus on "fidelity bond" risks to include burglary, robbery, fraud, forgery, embezzlement, and liability.**
- **You are your credit union's best chance to manage risks in your area. Why? Because you're there on the frontlines!**
- **You'll learn how to:**
- **Self assess yourself and credit union's exposures to loss.**
- **You'll benchmark your credit union's RM staff training as it relates to violence in the workplace and executive protection.**
- **We don't have time to waist. The latest terrorist's threats focus on disrupting the economy.**
- **You'll learn... what you, your credit union and chapter must do before the next attack.**
- **You'll be introduced... to the Incident Command System and learn what your chapter is doing to create public to private partnerships in the war against terrorism!**
- **Please read my white papers on Maslow's Hierarchy of Needs and the ICS.**
- **Based on the pre session RM surveys... We'll discuss best and worst practices of the credit union movement during recent disasters, terrorist attacks, and pandemics.**
- **Please encourage others to complete the survey. There are no silver bullets and no one has all the right answers!**
- **If time permits...We'll discuss what you, your credit union, and credit union chapter can do during each of the five crises response' phases:**
- **For Example...(Note: We'll go over in general what the third year students will be studying in detail. If you need more specifics, talk to third year students or visit our RMLC' RM library at [www.rmlearningcenter.com](http://www.rmlearningcenter.com).**
- **We'll discuss Phase I - It's two months before hurricane season, life is back to normal and everyone knows it will be 100 years before the next disaster.**
- ***How do you motivate the cynical apathetic?***
- ***What process improvements and response partnerships are in place since last season?***
- ***What are your "concentration" risks?***
- **We'll discuss Phase II - The event is possible. According to the nightly news, a hurricane is forming at the exact spot Katrina was born in 2005.**



- *It's time to test your plan, response personnel, and incident command!*
- *What's your first and next step?*
- **We'll discuss Phase III: The event is eminent. The order to evacuate was given and even the guy who road out Katrina has left town. Gas lines are forming and you're starting to panic.**
- *Will you "house in place" or evacuate?*
- *We'll discuss when and how to do both!*
- **We'll discuss Phase IV- The hurricane is on shore making Katrina look like a cake walk! You're in command of a "unified" command:**
- **We'll review the duties and responsibility of:**
- **The Incident Commander and Command Staff (Chief of Operations, Planning, Logistics, and Finance),**
- **The Staging Area Managers, and**
- **Those setting up and operating the EOC**
- **We'll discuss Phase V – The hurricane leveled everything in it's path, thousands are homeless, hundreds are dead and missing. The response from the public is overwhelming!**
- **How will you assess damages?**
- **Define the scope and adjust for scope creep?**
- **Take command and control the response?**
- **Set up and manage the EOC?**
- **Handle the news media?**
- **Finally: you'll receive guidelines you can use to lead first responders to the rescue, evacuees out of harms way, and victims to full recovery!**

*—You'll also be given a game for building public to private partnerships in your community and credit union chapter!*

*Thank You!*