

Associate in Risk Pool Management 602

Course Description

The focus of ARPM602 will be the application of curriculum learned in the ARPM series (ARM 54, 55, 56, CPCU 530, and ARPM 601) with particular attention to creativity, innovation, and practical results. Candidates are given the flexibility of meeting this requirement in either of two formats: a business-related work project or a personal interview project. Register for ARPM 602 at www.ieatraining.com under the semester class tab on the top of the IEA home page.

Timeline

Candidates will register for ARPM 602 through IEA.

Within 30 days of registration, the Candidate must submit to IEA's Curriculum Director the proposed method of completion with intended outcome(s) as noted in the "Options For Completing ARPM 602". This document will be presented to the CAJPA Education Committee for review/approval. The approved project must be completed within one calendar year of original ARPM 602 registration.

OPTIONS FOR COMPLETING ARPM 602

Business-related work project

Candidates must submit a project proposal to IEA that meets the standards of SMART goal setting. Specifically, the goal must be Specific, Measurable, Attainable, Relevant (to risk pooling or risk management issues), and Time based; refer to the "Smart Goals" located in this section.

This project can take the form of an executive report or research paper, or it can also be a specific project the results of which are not limited to a report format. It must be relevant to risk pool management or risk management professions, should be fully developed and professionally presented, and must include a reasoned and well thought-out management recommendation. Candidates who choose this format may work in cooperation with a mentor in the development of the project, especially where specialized knowledge is required, i.e. risk pool administrator, risk manager, CPA, attorney, expert in a risk management subject, etc.

Professional Interview

This is an option for candidates who wish to meet their goals through extensive one-on-one interviews with five current or retired pool managers who managed a risk pool within the past five years of the ARPM 602 registration year. A series of questions will be provided from which the candidate can choose five, with the goal of identifying the key elements of effective pool management. Interviewees must currently hold the position of pool manager or equivalent title and responsibilities, including supervision of pool staff and have a minimum of five years' experience as pool manager overseeing at least one self-insured program.

Retired pool managers are also eligible for interviewing so long as they were actively employed as such within five-years of the year the ARPM candidate registered for ARPM 602.

At least one of the five individuals interviewed must be from a management firm under contract to provide pool management services.

The goal of the “Professional Interview” is to help the ARPM designee develop a network of mentors with whom the designee can develop a professional mentoring relationship such that they may seek their advice on issues they face in the future.

The ARPM 602 learner must send the required information concerning their chosen option to:

Curriculum Director
IEA
2670 N. Main St., Suite 350
Santa Ana, Ca 92705

See Guidelines for Professional Interview located further in this document.

SMART Goal Setting

The SMART acronym represents goals that are Specific, Measurable, Attainable, Relevant, and Time Framed. Candidates will develop and propose their own goals within the above guidelines.

I encourage you to pick up a pen and a piece of paper and jot down the goals you want to reach. Look at each goal and **evaluate** it. Make any changes necessary to ensure it meets the criteria for **SMART goals**:

S	=	Specific
M	=	Measurable
A	=	Attainable
R	=	Realistic
T	=	Timely

Specific

Goals should be straightforward and emphasize what you want to happen. Specifics help us to **focus our efforts** and **clearly define what we are going to do**.

Specific is the What, Why, and How of the SMART model.

WHAT are you going to do? Use action words such as direct, organize, coordinate, lead, develop, plan, build etc.

WHY is this important to do at this time? What do you want to ultimately accomplish?

HOW are you going to do it? (By...)

Ensure the goals you set are very **specific, clear and easy**. Instead of setting a goal to lose weight or be healthier, set a specific goal to lose 2cm off your waistline or to walk 5 miles at an aerobically challenging pace.

Measurable

If you can't measure it, you can't manage it. In the broadest sense, the whole goal statement is a measure for the project; if the goal is accomplished, this is a success. However, there are usually several short-term or small measurements that can be built into the goal.

Choose a goal with measurable progress, **so you can see the change occur**. How will you see when you reach your goal? Be specific! "I want to read 3 chapter books of 100 pages on my own

before my birthday" shows the specific target to be measure. "I want to be a good reader" is not as measurable.

Establish concrete criteria for measuring progress toward the attainment of each goal you set. When you measure your progress, you stay on track, reach your target dates, and experience the exhilaration of achievement that spurs you on to continued effort required to reach your goals.

Attainable

When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop that attitudes, abilities, skills, and financial capacity to reach them. You begin seeing previously overlooked **opportunities** to bring yourself closer to the achievement of your goals.

Goals you set which are too far out of your reach, you probably won't commit to doing. Although you may start with the best of intentions, the knowledge that it's too much for you means your subconscious will keep reminding you of this fact and will stop you from even giving it your best.

A goal needs to stretch you slightly so you feel you can do it and it will need a real commitment from you. For instance, if you aim to lose 20lbs in one week, we all know that isn't achievable. But setting a goal to loose 1lb and when you've achieved that, aiming to lose a further 1lb, will keep it achievable for you.

The feeling of success which this brings helps you to remain motivated.

Realistic

This is not a synonym for "easy." Realistic, in this case, means "**do-able.**" It means that the learning curve is not a vertical slope; that the skills needed to do the work are available; that the project fits with the overall strategy and goals of the organization. A realistic project may push the skills and knowledge of the people working on it but it shouldn't break them.

Devise a plan or a way of getting there which makes the goal realistic. The goal needs to be realistic for you and where you are at the moment. A goal of never again eating sweets, cakes, crisps and chocolate may not be realistic for someone who really enjoys these foods.

For instance, it may be more realistic to set a goal of eating a piece of fruit each day instead of one sweet item. You can then choose to work towards reducing the amount of sweet products gradually as and when this feels realistic for you.

Be sure to set goals that you can attain with some effort! Too difficult and you set the stage for failure, but too low sends the message that you aren't very capable. **Set the bar high enough for a satisfying achievement!**

Timely

Set a timeframe for the goal: for next week, in three months, by fifth grade. Putting an end point on your goal gives you a **clear target** to work towards.

If you don't set a time, the commitment is too vague. It tends not to happen because you feel you can start at any time. Without a time limit, there's no urgency to start taking action now.

Time must be measurable, attainable and realistic.

Everyone will benefit from goals and objectives if they are SMART. SMART, is the instrument to apply in setting your goals and objectives.

EDUCATION COMMITTEE

The CAJPA Education Committee is comprised of three to five pooling professionals, all with risk pool management experience plus IEA's Curriculum Director. IEA's Curriculum Director facilitates meetings, assists in maintaining performance and curriculum standards, and approves ARPM 602 projects with other Education Committee members. The Education Committee membership is a continuous appointment; however, a periodic review of a committee member's service commitment will be conducted by IEA's Curriculum Director.

While the original plan development was in partnership with CAJPA, for purposes of national application the Education Committee will be comprised of representation from CAJPA, AGRIP, PARMA and/or other similar agencies. IEA's Curriculum Director may increase the size of the Education Committee to reflect a balanced representation geographically and organizationally. Approval of the learner's project may be granted by the support of any committee member; however, successively meeting the requirements of the ARPM 602 course will require approval by the majority of Education Committee members.

CONTINUING EDUCATION REQUIREMENTS (CE)

Continuing Education credit must be earned annually to maintain the ARPM Designation. A total of six CE hours must be completed annually. These credits/hours must be earned in a field related to pool management and/or leadership skills. Examples include attendance at professional pooling conferences such as CAJPA, PARMA or AGRIP, management-level IEA coursework presentations at RM functions, etc. Please refer to the ARPM Rules and Regulations regarding the continuing education hours.

GUIDELINES FOR COMPLETING THE PROFESSIONAL INTERVIEW

The purpose of the Professional Interview is to give ARPM Candidates the opportunity to see how veteran Pool Managers put their experience and education to work every day to serve their organizations.

Process

Candidates are given a list of sample questions from which they must select a minimum of five (5) to pose to their interviewees. Candidates also have the option of developing their own question(s) in addition to the five chosen from this approved list. It is not necessary to use all the questions in the entire project.

A summary and analysis of the feedback gained from the interviews is to be prepared in the following format:

- Word document double spaced

- Cover page with Candidate Name, date of submission and title

- The second sheet should identify the following information about the five individuals interviewed: Name, Job Title, Name of Pool Represented, Years with Current Pool,

Years in Pooling, Years in Insurance/Risk Management, interview format (i.e., in person, telephonic, etc.), questions posed, and the date of the interview; An executive summary, including Candidate's observations; and Details regarding the interview, the specific questions asked, and a general report on the responses with a closing summary.

Considerations in Selecting Interviewees

Candidates will identify and select five (5) experienced pool managers to interview. Qualifications must include the following:

- Current or retired risk pool manager having a minimum of five years experience as a full-time pool manager overseeing at least one self-insurance program. A retired risk pool manager must have managed a risk pool full-time within five years since the year the candidate registered for ARPM 602.
- Professional pool management consultations are acceptable so long as they meet the requirements above.

For qualified volunteers, please contact the CAJPA Education Committee Chair (www.cajpa.org).

California Association of Joint Powers Authorities (CAJPA)

P.O. Box 255431

Sacramento, CA 95865-5431

916-485-5875 - office

916-487-7105 - fax

Grading Criteria

The CAJPA Education Committee will assess reports based on the following criteria:

- Interviewees meet qualifications at the time the candidate registered for ARPM 602;
- The minimum of 5 interviews are conducted using a minimum of 5 questions from the sample interview question section;
- The quality of writing and presentation;
- The Candidate's analysis and summation, with the three most important lessons learned and plans for practical application in the workplace.

Grading will be Pass/Fail.

Presentation of Final Product

Candidates may be invited to interview personally before the CAJPA Education Committee and may be asked to present their findings at the Annual CAJPA Conference the following September.

Sample Interview Questions

Each interview must consist of five (5) questions, either from the sample list.

NOTE: Candidates have the option of creating questions of their in addition to the minimum 5 questions used from the Interview Questions below. The ARPM candidate does not have to select five different questions for each interview.

1. Could you describe two or three mistakes that a new Pool Manager might make and ways to avoid making such mistakes?
2. Describe your professional network and how you built it. Are there areas where your network could be strengthened? What are they and how would you proceed?
3. What are your goals for your pool for the next five years? Have your goals for the pool ever been in conflict with the board's direction? How did/would you address such a circumstance?
4. What personality traits are most important in being a successful Pool Manager? Why? Can these traits be learned?
5. What do you believe to be the ideal preparation for a Pool Manager, and looking at my resume, how would you suggest that I augment my preparation?
6. I have heard that volunteering to do any internship or extended "shadowing" of a Pool Executive would be a very good learning experience. Do you agree? What circumstances might make this more effective at one pool versus another?
7. Has a mentor been instrumental in your reaching your goals; and, if so, what characteristics of that individual were most inspirational or instructional?
8. What new developments or future issues do you expect risk pools to encounter in the next five years? What new trends are developing for pool management? How do you suggest I prepare to meet these new challenges?
9. Reputational risk is an emerging issue for current pool managers. What policies and procedures are in place to protect your pool from this type of risk? How do you view this risk and what can I do to prepare myself to protect a pool and its board?
10. Technology is ever changing. How does your pool protect its information and database and to what extent do you oversee the technological aspects of the pool?
11. What qualifications do you believe to be the most important for a Pool Manager to have to begin their career?
12. Pool Managers need to have experience and knowledge with a variety of issues including: insurance, marketing, politics, personal relationships and technology. Of these, which do you feel are the most important in managing a pool? How did you gain experience in each of these fields?

13. Were you able to hire your own staff members? What qualifications do you look for in hiring staff, both managerial and office workers, technical and clerical? What would you consider to be some of the most desirable traits of an employee?
14. How much interaction do you have with the pool's general counsel and/or attorney panel? What experience and knowledge do you look for in an attorney who will be working with your membership?
15. How do personal relationships and political correctness affect your management style in running a pool? What advice would you give a new pool manager dealing with a personal relationship between him/herself and a board member? Between a pool manager and service providers? How do you handle relationships between board members, especially potentially explosive relationships?
16. What educational background did you have when you were first hired to manage a pool? Have you continued your education with either formal or professional classes? Which academic or professional classes or programs have helped you the most to succeed in your career?
17. How do you evaluate a pool as a potential employer? Excluding compensation, what about the pool specifically should I take into consideration before accepting a position?

Questions

Check out the CAJPA or IEA Websites for additional information about the organizations and educational programs: www.cajpa.org and www.ieatraining.com.

IEA's Curriculum Director contact information: david@ieatraining.com

David Blakesley, CPCU, CIC, ARM
2670 N. Main St., Suite 350
Santa Ana, Ca 92705

Course Project Proposal

Student Name: _____
Address: _____

Telephone: _____ **E-Mail:** _____

Proposed Project Format: _____ Work Paper/Project (Complete Sections A and C)
_____ Pool Manager Interviews (Complete Sections B and C)

Proposed Goal Statement and Plan for Completing the Project using SMART goal development techniques: (Use separate sheet as necessary)

Section A: Work Paper/Project (Use separate sheet as necessary)
Presentation Format (please describe the intended format for meeting the above goal, i.e., written paper, presentation, etc.):

Section B: Pool Manager Interview

List of Interviewees Proposed:

1. Pool Manager Name/E-Mail Address:
2. Pool Manager Name/E-Mail Address:
3. Pool Manager Name/E-Mail Address:
4. Pool Manager Name/E-Mail Address:
5. Management Firm Representative Name/E-Mail Address:

Section C

By signing below, I understand that the above goal must be approved in advance by the CAJPA Education Committee. Once approved, I will have one year (365 days) to complete the goal and return the resulting project to the CAJPA Education Committee for approval in order to complete the ARPM Designation requirements from the date I registered in the class.

Student Signature

Date

Section D: TO BE COMPLETED BY THE CAJPA EDUCATION COMMITTEE

Proposal Received on: _____ Decision Date: _____
Date

APPROVAL STATUS:

Goal Approved as Presented: YES NO Date: _____

Conditional Approval* YES Date: _____

*Additional Requirements:

Resubmittal Required YES Date: _____

Comments:
