



THE NATIONAL ALLIANCE
for Insurance Education & Research



2024 In-Person Classes

Sponsored by SIA

1. May 16th: Fundamentals of Risk Management
2. June 27th: Handling School Risks
3. August 13th: Measuring School Risks
4. September 18th: Funding School Risks
5. October 30th: Administering School Risks

Schedule for each class:

- 7:30 am to 8:00 am - Arrival & check in
- 8:00 am to Noon - Course Instruction
- Noon to 12:45 pm - Lunch will be provided
- 12:45 pm to 3:45 pm - Course instruction
- 3:45 pm to 4:15 pm - Review and Q&A
- 4:15pm - Exam (must have your own laptop) or you can choose to take the exam 4-5 days later with Monitor EDU (online proctor).

** CA CE credit and CSRM update Credit requires full attendance at course.*

Register for an individual class or the entire series and take the classes in any order.

SIA Member Employees are sponsored by SIA.

REGISTER HERE

Certified
School Risk
Manager

Information:

Contact Teresa Franco
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CSRM: Protecting schools and school budgets

The Certified School Risk Managers Program

CSRM is a cohesive, unified education and designation program that builds risk management knowledge as well as trust within the school system. Participants will attain in-depth knowledge of the risk management process and terminology based on the philosophy and theory of school risk management. They will also learn how to better protect their schools against unplanned losses and to effectively maintain budget integrity in tough economic times by gaining proficiency in:

- Risk Identification
- Risk Analysis
- Risk Control
- Risk Financing
- Risk Administration

The CSRM faculty is represented by practicing school risk management professionals. Participants will become more efficient, knowledgeable, and better able to affect the total cost of risk impacting the budget of the school system. The CSRM Program is also a **continuing education** opportunity; any eligible individual may attend classes without taking the examinations or working toward the designation.

Who Should Attend

Those employed by school districts as risk and business managers, employee benefits or safety coordinators, administrative, or other positions that oversee the risk management function, will benefit significantly by earning this designation. Insurance agency, brokerage, and company personnel who work with school risk managers are also encouraged to attend. Networking with other risk managers is encouraged throughout the CSRM Program.

What to Expect

CSRM courses are intensive, concentrated learning experiences that can be applied to the workplace immediately. Participants will receive personal, expert instruction for the real-world issues of managing risks. Each one-day course is available through classroom or online instruction, and includes an optional multiple-choice examination.

Students may choose to take all five courses any way they wish—in the classroom, online, or “mix and match” by combining the face-to-face interaction of a classroom with the convenience of CSRM Online. Successful completion of a final exam is required to earn CE credit for a CSRM Online course.

The Five Courses of Study:

1. Fundamentals of Risk Management

This course provides an in-depth look at the overall risk management process, delves into the identification step of the process, and examines the function of the school risk manager.

- Risk Management Function and Process
- School Risk Manager Role
- Identifying School Risks: Logical Classifications
- Identifying School Risks: Methods
- Gathering Loss Data

2. Handling School Risks

This course studies the development of a safety and health plan, loss control fundamentals, risk control and mitigation of exposures, and managing school claims. A post-accident loss control reduction technique is included.

- Introduction to and Fundamentals of Controlling Risk
- Safety and Health Program for School Districts
- School District Exposures
- Managing School Claims

3. Measuring School Risks

This course includes the mechanics of developing, forecasting, and trending losses to be used in determining insurance program retentions and deductibles.

- Introduction and Qualitative Analysis for School Risks
- Qualitative Risk Assessment and Loss Run Analysis
- Quantitative Analysis: Tools and Forecasting
- The Risk Analysis Process

—with courses offered in classroom, online, and in-house formats.

4. Funding School Risks

The purpose of this course is to examine various loss funding techniques, including guaranteed cost programs, deductibles and retention programs, pools, and transferring risk through contracts.

- Introduction to Funding School Risks
- Foundations for Funding
- Options for Funding School Risks
- Reserving for School District Risks
- Finance Issues for the School Risk Manager

5. Administering School Risks

This course covers how a school risk manager implements and monitors the school risk management program, the risk management team, information technology, allocating costs, ethics in school risk management, and requests for proposals.

- Introduction to Administering School Risks
- The School Risk Management Team
- Communicating with the Risk Management Team
- Implementing the Risk Management Program
- Monitoring the Risk Management Program
- Ethics

Benefits of the CSRM Program

- Increase skills in identifying potential sources of loss within school operations.
- Meeting the dramatically increasing demand for basic risk management knowledge in and beyond the school environment.
- Approved for CE credit in all states.
- Improve ability to forecast loss amounts and maintain adequate reserves.
- The affordable registration fee includes all the course outlines and reference materials.
- Demonstrate professional competence through attainment of the CSRM designation.



“Of all the opportunities that exist for risk management education, I consistently find that the CSRM courses offer the best value. First, the curriculum is topical and always up-to-date. Second, they pack an extraordinary breadth and depth of information into an easily accessible one-day course. Third, the price and time commitment are unmatched in terms of value for money (and time is money!). Whether one takes the online courses or the one-day class, they will gain a deeper understanding of the science of risk management and its application to real-world scholastic issues.”

John G. Chino, ARM-PE, CSRM

Area Senior Vice President
Gallagher Public Entity & Scholastic Division
Arthur J. Gallagher

The CSRM Designation—a statement of professionalism

By completing the entire CSRM course of study, including examinations, within three years, individuals can earn the prestigious designation “Certified School Risk Manager,” visible proof of professionalism and specialized knowledge. CSRM is a resumé-enhancing designation that human resource professionals consider a distinct advantage when making hiring decisions.

Maintain your designation and ensure your continuing career development by fulfilling your commitment to update annually by attending courses provided by The National Alliance.

CSRM courses are approved for CE credit in all states and are available in three formats:

- **Classroom:** One-day courses are offered across the U.S.
- **CSRM Online:** A great CSRM education is available online. Visit www.TheNationalAlliance.com/online_courses to learn more about CSRM Online.
- **In-House:** Train your entire team and save money by bringing National Alliance programs to your location. For details, go to www.TheNationalAlliance.com or call 800-633-2165.

Important note: Certified Insurance Service Representatives (CISRs) can satisfy their annual update requirement by attending a CSRM course.

A Proud Tradition

The CSRM Program is conducted by The National Alliance for Insurance Education & Research, the nation’s premier insurance and risk management education provider since 1969. The National Alliance includes the Certified Insurance Counselors (CIC) Program, the Certified Risk Managers (CRM) Program, the Certified School Risk Managers (CSRM) Program, the Certified Insurance Service Representatives (CISR) Program, Dynamics Series Program, The National Alliance School for Producer Development, and The National Alliance Research Academy.

*The National Alliance for Insurance Education & Research is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

