



SENIOR ASSOCIATE MEETING

1. **Build a database of Senior Associates who are in your market.** For community banks in your chapter's footprint, request a Senior Associate list from HQ for your member institutions. For regional and large banks that are not headquartered in your region, you will want to identify a key decision maker/influencer for the local footprint. Collect names and contact information.
2. **Define what you want to achieve in the meeting:**
 - a. Fresh perspectives and new ideas.
 - b. Greater awareness of RMA.
 - c. An increase in volunteer leadership pool.
 - d. An increase in Associate memberships.
 - e. Improved attendance at general membership meetings.
 - f. Add value to members through career enhancement, mentoring, and networking opportunities.
 - g. All of the above!
3. **Plan an outreach program to relay what you want to achieve.** Program ideas can span from a roundtable meeting, to a mail/email campaign, to individual phone calls to identified Senior Associates in the footprint.
4. **During the meeting relay information that is relevant to what you want to achieve. Consider the following:**
 - a. **Chapter background:**
 - Provide background on the chapter including geographic area/counties covered, membership size, volunteer board composition and prior year's schedule of events.
 - b. **General membership: did you know?**
 - The chapter holds a series of general membership programs throughout the year. Describe offerings and be sure to emphasize signature programs.
 - Questions:
 1. Are these programs that you would be interested in having your associates attend?
 2. What programs are missing from our offerings?
 3. Would you be interested in participating as a presenter or moderator at an upcoming event?
 4. How can we best get the word out to your associates about the events to bolster attendance? Is the Senior Associate the appropriate contact to relay offerings through for further dissemination or are there additional contacts?



c. Education: did you know?

- The chapter holds a number of open enrollment classes cosponsored with HQ over the year. Courses cover subjects from basic credit training to advanced training and include specialty subjects like *Lending to Nonprofits* and *Analyzing and Interpreting Real Estate Appraisals*. If you have a facility that is large enough to host an open enrollment program and we receive interest from seven paid registrants, you will receive a host seat in the class for FREE.
- The chapter also offers the following locally developed educational programs to supplement cosponsored open enrollment programs: _____ (insert a list of offerings).
- Questions:
 1. Which courses would the institution like to see offered? Offer to share the list of programs and follow up.
 2. Would the institution be interested in hosting a future open enrollment?
 3. Is the Senior Associate the appropriate contact to relay offerings through for further dissemination or are there additional contacts? Who do we contact when trying to fill a class to the minimum needed to hold the class?

d. Affinity Groups: did you know?

- The chapter also has the following affinity groups : _____ (insert list and describe active groups such as YP, WIB, ERM, Credit Analyst, Compliance etc.). Provide a sample of programs offered by each group (round table, networking, panel discussions etc.).
- Questions:
 1. Do you have associates that might benefit by participating in these groups? Collect names and email addresses for further follow up.

e. Membership: did you know?

- Associate member benefits reminder:
 1. RMA Xchange: An exclusive online community for individual members.
 2. Preferred pricing for associate members on all RMA events, products, services, and training.
 3. *The RMA Journal*®: hard copy subscription, digital version, downloadable articles.
 4. *The RMA Journal*® on the mobile app.
 5. Banking 101 Recorded Web Seminars.
 6. Free recorded Web Seminars on a variety of additional topics.
 7. Online Credit and Lending dictionary.
 8. Free downloads of Industry Study Packs.
 9. Member Roster Online.
 10. Professional Member Directory.



11. Regulatory Update: Periodic e-newsletter offering the latest regulatory updates.
12. Surveys and studies.
13. Access to local chapter network meetings and events.
14. Career development/leadership and networking opportunities.

- Institutional membership benefits reminder.
 1. Discounts on all RMA events, products, services, and training.
 2. FREE downloads of RMA's Enterprise Risk Management Workbook Series.
 3. Complimentary copy of RMA's *Annual Statement Studies*SM.
 4. Guide for implementing an internship program.
 5. Quality training and peer sharing opportunities.
 6. RMA CECL Service (fee applies).
 7. Banking 101 Recorded Web Seminars.
 8. Board Briefing Recorded Web Seminars.
 9. FREE Senior and Alternate Associate.
 10. Invitations to specialized round tables.
- Questions:
 1. Is there interest in further discussing benefit access?
 2. Are there any benefits that require follow-up by the chapter? By RMA HQ?

f. **Academic program: did you know?**

RMA's academic program seeks to fill the talent gap in the industry by getting students interested in the banking and financial services industry. This is being accomplished through:

- Student memberships (FREE).
- Student scholarship: A foundation has been formed to support the activities of the academic program by offering scholarships to select students interested in a banking career.
- Student internship: financial institutions that have internship needs can post their internship needs on the RMA HQ website for FREE.
- Questions:
 1. RMA has a *Guide for Developing an Internship Program*. This document was developed by community bankers to help other bankers create internship programs. The document includes information on getting the program started, a sample template, real program curriculums used by other banks, and tips. Can we send you a copy of the guide?
 2. Do you need assistance in posting your internships to the RMA HQ website?

g. **Chapter leadership: did you know?**

- Volunteer opportunities exist. RMA encourages associates to get involved in the association and make an impact. There are opportunities to suit an associates interests, level of effort,



and available time commitment. Describe current opportunities available at the chapter level on the board and various committees.

- Questions:

1. Do you have any interest in participating at a local or national level?
2. Are there associates you would recommend that we reach out to about volunteer opportunities?

h. What could we do better?

i. What would you like to see from the chapter that we are currently not doing?

j. Thank you!

5. Track the benefits of the group over time. Request feedback from the group on a regular basis. Report feedback and participation to the board.