

Bidders Conference Questions

Besides products and services to members, what are BARM's sources of revenue?
membership (not-for-profit)

Does BARM endorse/use a particular enterprise risk management framework?
We don't understand the context of the question.

What products are offered by BARM? What exactly are your training products? What do you mean by "training product"?
We denoted this in the RFP. Please re-read it.

How often and where are the instructor-led training courses held?
Whenever a chapter sponsors a class, or whenever a bank wants training.

What are major differences between the regular instructor-led training courses and the customizable courses?
Customizable courses have bank logos and bank information. This is usually a bank sponsored training session, not a chapter sponsored training session.

How large is your current training department? Who creates your training materials now? How many employees do you have?
We do not have a true training department. We have a department entitled Strategic Learning and Research. The department consists of 7 Project Managers, two graphic artist (creates the Instructor Guide and Participant's Manual), and an Administrative Assistant. The instructors who develop the training are not part of this department.

What is the background of members of your training department?
They all have a training background.

What is the structure of your current instructor-led training? (how long do sessions last, etc.)
Sessions range from ½ day mini courses to a week long sessions.

Are there any other languages in which the training is offered?
This is not relevant to the RFP.

Is there a logo available? If not, is there a company color scheme?
Logo is attached.

May we have a copy of the student guide, instructor guide, PowerPoint presentation and detailed course descriptions?
These items will be provided when the project has been awarded.

Are there specific materials for the requested "Your Responsibilities Under the Sarbanes-Oxley Act" prototype?
Please read the RFP for any specifics.

The RFP lists March 24, 2008 as the due date, while previously it was listed as March 31, 2008. Which is correct? Verify the proposal due date. (I'll answer this question)

What are the general time frames for training currently? Is training generally done in one-hour blocks or day-long seminars, etc.?

Please see answer above on the structure of training.

What is the current marketing/advertising for the training programs available?

We publish a catalog with course descriptions. The catalogs are provided to our chapters and individual members.

What system is currently in place to gauge member interest/receive feedback from members?

A level 1 smiley sheet is distributed by the instructor at the end of each session. We ask if they found the course beneficial and if the instructor was good.

Is there an internal research and development team?

For what?

Does the Banker's Association of Risk Management have a slogan or tagline?

No.

What percent of members live/work outside of the U.S.?

This is not relevant. This RFP focuses on U.S. only.

What is the company website?

The website is for members only.

What percent of the revenue is due to credit risk certification programs? What is the significance of this program to BARM?

We do not have statistics on this. It is a significant component of our training program.

What is the contact information for the customer advisory group as well as the board of directors?

This information will be provided during the kick-off meeting when the project is awarded.

What is the success rate of their 50 instructor-led courses?

We have not statistics to on this.

How long are your instructor-led courses?

This is answered above.

As a non-profit, how are you funded?

Not-for-profit funded by membership fees (chapter memberships). Non-members can also take training, but at an increased price.

How do you market your current training?

This is answered above.

What tools do you use to analyze your current training?

None

Who are your clientele?

Mostly banks.

What percentage of your revenue comes from banks and non-bank financial institutions?

95%

What do your self-study and standalone materials consist of?

Student Guide and PowerPoint slides

Are individuals enrolling themselves or are companies enrolling their employees in your workshops and training seminars? What percentage of people is coming from institutions and what percentage are individuals?

Member and non-member institutions can send their employees, but generally individuals do not sign up for training.

Where are you holding your workshops and training seminars?

They are typically held at a bank conference center. It can be a bank that is sponsoring a chapter event, or it can be a bank sponsoring their bank's training.

Are you training the trainers, or are you training institution personnel?

Our training is for institution personnel. Our instructors are not trained on how to deliver the training as they are the ones that write it.

What percentage of your business is creating customized training solutions?

35%

Do you already have an evaluation method in place to evaluate products or trainers that you currently have? If so, what is it?

A project manager is responsible for their courses. A project manager must attend one course session per year. The project manager is responsible for evaluating the instructor's performance. We also use the "smiley sheet" method for participants to provide an evaluation.

How often do you update or improve your training materials?

As needed. If a regulation changes, then the course is updated. If a bank takes an off-the-shelf product and wants it customized, then it is updated by the instructor/SME.

What percentage of your clientele is in Europe? North America? Asia/Pacific?

This is not relevant to the RFP.

Is training done in a specific location?

Please see the answer above.

Is the same training available in Asia Pacific and Europe?

This is not relevant to the RFP.