



# 2021 NORTHWEST BANK OPERATIONS SCHOOL

Designed to advance your knowledge and career in bank operations.  
Holiday Inn Portland South Hotel & Convention Center | August - November 2021

The Northwest Bank Operations School provides a solid foundation upon which to build your career in banking. Designed for those looking to advance their knowledge in bank operations, this signature program explores the issues facing bank operations personnel and provides an in-depth framework to examine the operations that support bank services.

You have the option to register for the full program and receive a graduation diploma upon completion, or you may register for individual sessions that meet your specific needs. Whether registered for the entire program or an individual session, you will leave with an enhanced understanding of your role within your bank.

## Learn about:

- The Business of Banking
- Bank Regulatory System
- Sales Culture
- New Accounts
- Communication
- Compliance
- Bank Security
- Employee Supervision
- Payment Trends
- Community Engagement

Register for the full program or individual sessions at: [bit.ly/2021BankOpsSchool](https://bit.ly/2021BankOpsSchool)



WASHINGTON BANKERS ASSOCIATION

# PROGRAM CURRICULUM-PRELIMINARY

## AUGUST

### Day 1 – Tuesday, August 24 | 9 AM - 4 PM



#### BANKING & YOU

(9:00 – 9:45 am)

*Linda Navarro, President & CEO, Oregon Bankers Association*

During her 25-year career with the Oregon Bankers Association, OBA President & CEO Linda Navarro has had the opportunity to engage with bankers at all levels and advocate on their behalf. In this opening session, Linda will discuss banking in Oregon and the important role you play not only in the operations of your bank, but as an integral member of Oregon's banking industry serving Oregon's communities.



#### THE BUSINESS OF BANKING

(9:45 - 11:45 am)

*Ben Mansheim, Chief Operations & Technology Officer, Pacific West Bank*

We all know that banks are in the business of lending money, but how do banks make money? What does it mean to be a profitable bank? In this session, you will learn the basic business of banking ensuring a solid foundation upon which to grow your career as a banker.



#### OVERVIEW OF THE BANK REGULATORY SYSTEM

(12:15 – 2:15 pm)

*Stephen Gordon, Chief of Regulation and Supervision, Banking and Securities, Oregon Division of Financial Regulation*

Banking is one of the most highly regulated industries. But what does it mean to be a regulated industry? In this session, you will learn about the structure of the U.S. bank regulatory framework, the regulatory examination process, and financial ratios and data that are used to assess the operating performance and financial condition of banks.



#### OVERVIEW OF BANK FINANCIAL STATEMENTS

(2:30 – 4:00 pm)

*Fred J. Peterson, CPA, Partner, Moss Adams*

So just how does a bank function? This session will use the income statement of the bank to walk through the basic concept and function of traditional banking as a financial intermediary: Deploy cash from depositors and stockholders; earn through lending funds to creditworthy borrowers; and invest the remainder in safe investments.

### Day 2 – Wednesday, August 25 | 8:30 AM - 12 PM



#### SALES CULTURE & BANKING THE CUSTOMER OF THE FUTURE

*Vicki Kraai, Chief Executive Officer, InterAction Training*

The term "sales culture" is often viewed at all levels of an organization as a negative, product-pushing, doesn't work, long-term exercise that may or may not produce results. This session will identify key elements that comprise a bank's sales environment and explore how to continuously move an organization's culture in a direction where "sales" and "selling" are viewed as a natural extension and enhancement of your bank's customer service philosophy.

### Bonus – Thursday, August 26 | 9 AM - 4 PM



#### MANAGING A HIGH-PERFORMING BRANCH

*Vicki Kraai, Chief Executive Officer, InterAction Training*

Join one of the country's highest-rated speakers on leadership and company culture for this workshop focused on helping you excel as a branch manager. If you want an exceptional, high-performing branch, Vicki is determined to help you get one.

This workshop includes five tracks, each intended to take your skills as a branch leader to the next level:

1. Nailing your job as a leader
2. Hunting for and onboarding your next new hire
3. Establishing credibility...the ultimate secret ingredient
4. Excelling at courageous conversations
5. Elevating your emotional IQ

**\$345** for members

**\$250** for students enrolled in the full Northwest Bank Operations School program, take advantage of an additional day of training at a special price

**\$450 Special offer:** Register for both Sales Culture & Banking the Customer of the Future and Managing a High-Performing Branch

## SEPTEMBER

### Day 1 – Tuesday, September 28 | 9 AM - 4 PM



#### NEW ACCOUNTS WORKSHOP – GETTING IT RIGHT!

*Suzette Jones, CFP, Managing Member of Training Resources Consulting, LLC*

Managing risk is the #1 priority for all financial institutions, and it all starts at the new account desk. If a criminal cannot get in, they cannot steal from your organization and community. Well-trained new account personnel and universal bankers who recognize and stop attempted dishonest activity are the first line of defense in protecting a financial institution from fraudsters. Unfortunately, new account personnel are often trained "on the job," which can result in an environment of potential vulnerability and unnecessary losses for the financial institution. Additionally, with constant new regulations, the need for ongoing compliance training is paramount to maintain diligence and update processes and procedures. This full-day workshop, covering Idaho, Oregon and Washington state laws, teaches essential new account opening procedures, best practices, and compliance requirements. It answers complex questions asked by customers and staff while focusing on vital information for every new account type.

### Day 2 – Wednesday, September 29 | 8:30 AM - 12 PM



#### EFFECTIVE BUSINESS WRITING

*Elizabeth Tierney, Ph.D., Author, Trainer, Guest Lecturer at Willamette University*

In a world of texting and tweeting, do you worry that you have forgotten basic grammar, punctuation, and usage? Do you think you are too wordy? Are you concerned about setting the right tone, or weary of receiving follow-up emails seeking clarification? If so, this session should build your confidence and enhance your skills by reminding you about the importance of developing an accurate message, of analyzing your audience, of organizing your thoughts and of making and taking the time to edit and proofread for precision of language, thus ensuring your own credibility and professionalism.

# PROGRAM CURRICULUM-PRELIMINARY

## OCTOBER

### Day 1 – Tuesday, October 19 | 9 AM - 4 PM



#### THE ABCS OF OPERATIONAL COMPLIANCE (9:00 am – 2:15 pm)

*Elizabeth Madlem, Associate General Counsel, Compliance Alliance*

Elizabeth Madlem of Compliance Alliance will tackle the topic of operational compliance. Elizabeth will navigate through the ever-changing and multiplying regulations that you face every day and will provide you with an understating of the who, what, why and how of operational compliance.



#### BANK COMPLIANCE – WHAT YOU NEED TO KNOW: A PANEL DISCUSSION (2:30 – 4:00 pm)

*OBA Member Bank Compliance Officers*

Learn from Oregon's bank compliance experts during this engaging and interactive session.

### Day 2 – Wednesday, October 20 | 8:30 AM - 12 PM



#### DETECTING & REPORTING ELDER FINANCIAL ABUSE (8:30 – 10:00 am)

*Billie McNeely, Financial Exploitation Specialist, Oregon Department of Human Services-Office of Aging & People with Disabilities*

Financial exploitation is the most frequently reported form of elder abuse. Oregon statutes contain a "safe harbor" for bankers to facilitate reporting of suspected abuse. At the same time, bank personnel must be educated and empowered in detecting and reporting suspected abuse. In this session, Billie will discuss how to recognize and report financial abuse to the appropriate authorities, ensuring that you know how to help protect your vulnerable customers



#### THE SAFETY & SECURITY OF YOUR TEAM & BANK (10:15 am – 12:00 pm)

*Martin Ogno, Security Agent, Wells Fargo*

Do you know how to prevent violent incidents in your workplace? Do you know the warning signs? What course of action would you take if a threat were to overcome your bank? With his first-hand knowledge,

Wells Fargo Security Agent Marty Ogno will uncover what it takes to keep your team and bank safe and secure, while discussing other timely topics such as incident types, statistics, and methods of prevention.

## NOVEMBER

### Day 1 – Tuesday, November 16 | 9 AM - 4 PM



#### EFFECTIVE EMPLOYEE SUPERVISION

*Deborah Jeffries, SHRM-CP, PHR, CPC, Co-President, HR Answers*

Effective supervision starts on day one. This session will help you identify strategies for making the best supervisory impression on employees. Deborah will offer best practices that ensure you are clearly communicating and managing performance expectations. Topics to be covered include supervisor/employee relationships, conflict resolution, employee development, and company image.

#### EMPLOYEE PERFORMANCE REVIEWS & INTERVIEWING NEW EMPLOYEES

Deborah will discuss interviewing techniques, as well as effective preparation and guidelines to follow throughout the interview process. Focusing on employee performance, Deborah will cover boosting employee morale, how to motivate employees, and steps to minimize stress during performance reviews.

### Day 2 – Wednesday, November 17 | 8:30 AM - 1 PM



#### FASTER PAYMENTS: OPPORTUNITIES AND RISK MITIGATION (8:30 – 10:30 am)

*John Curtis, AAP, APRP, NCP, Senior Vice President of Education and Training, WesPay*

The emergence of new technologies presents new revenue opportunities for financial institutions in electronic payments. However, with faster payments comes increased risk. This session will examine the latest payment trends, channels in faster payments and risk mitigation to be considered as financial services move forward.



#### THE FUTURE OF BANKING AND THE IMPORTANCE OF INDUSTRY ENGAGEMENT (10:45 am – 12:00 pm)

*Panel Discussion with Bank CEOs*

"Community" plays a major role in the banking industry, and OBA CEOs know this first-hand. Panelists will discuss the crucial role of advocacy and education, and how YOU can get involved.

#### GRADUATION CEREMONY & LUNCH (12:00 – 1:30 pm)

Diplomas will be presented to full school graduates, whose supervisors will be invited to join the festivities.

## Who Should Attend?

### Full School

Bank employees seeking a comprehensive experience in bank operations.

### Individual Sessions

Bank employees looking to boost their knowledge in specific areas.

## HEALTH & SAFETY

The health and safety of you and your team matter. OBA is working with hotel staff to ensure a safe environment both in the classroom setting and in lodging accommodations. Social-distancing and extra room cleaning precautions will be in place. Classroom seating arrangements will ensure at least six feet of space between students, and mask use will be required in accordance with State of Oregon guidance.



Oregon Bankers Association
777 13th Street SE, Suite 130
PO Box 13429
Salem, OR 97309

REGISTRATION FORM

Registration Fees (IBA/OBA/WBA Members\*)

- Full Program: \$1,800
Additional Full Program Attendee: \$1,500
One Day session: \$345
Half-Day session: \$185

\*Non-members will be assessed a 50% surcharge.
All prices include course materials and refreshments. One-day sessions include continental breakfast and lunch. Half-day sessions include full breakfast.

Location & Accommodations

Holiday Inn Portland South Hotel & Convention Center.
Contact the Holiday Inn Portland South Hotel and reference the Bank Operations School for discounted lodging rates of \$99 per night or go to: bit.ly/OBAHolidayInn

CANCELATION POLICY & LATE FEES

The registration deadline is five days prior to a session and no refunds will be offered after the registration deadline; however, a substitute may attend. Registrations received after the deadline will be accommodated if possible, but may incur a late fee up to 5% of the registration. Cancellation requests should be sent in writing to jschubert@oregonbankers.com.

Register Online at: bit.ly/2021BankOpsSchool

Please select the session(s) you are registering for:

Full Bank Operations School Program

Tuesday, August 24 • 9 AM - 4 PM
Banking & You
The Business of Banking
Overview of the Bank Regulatory System
Overview of Bank Financial Statements

Wednesday, August 25 • 8:30 AM - 12 PM
Sales Culture & Banking the Customer of the Future

BONUS - Thursday, August 26 • 9 AM - 4 PM
Managing a High-Performing Branch (additional \$250 for Full Program Students)

Tuesday, September 28 • 9 AM - 4 PM
New Accounts Workshop—Getting it Right!

Wednesday, September 29 • 8:30 AM - 12 PM
Effective Business Communication

Tuesday, October 19 • 9 AM - 4 PM
The ABCs of Operational Compliance
Bank Compliance - What You Need to Know: A Panel Discussion

Wednesday, October 20 • 8:30 AM - 12 PM
Detecting & Reporting Elder Financial Abuse
The Safety & Security of Your Team & Bank

Tuesday, November 16 • 9 AM - 4 PM
Effective Employee Supervision
Employee Performance Reviews & Interviewing New Employees

Wednesday, November 17 • 8:30 AM - 1:30 PM
Faster Payments: Opportunities and Risk Mitigation
The Future of Banking and the Importance of Industry Engagement

Questions? Contact the Jennifer Schubert at (503) 576-4126 or email jschubert@oregonbankers.com
Send completed registration forms to: Oregon Bankers Association, PO Box 13429, Salem, Oregon 97309.

Registrant Information

NAME
BANK
TITLE
ADDRESS
PHONE
EMAIL

Method of Payment

Check Bill Me (members only) Visa / MasterCard / AMEX /Discover
CREDIT CARD #
EXPIRATION DATE SECURITY CODE
SIGNATURE
BILLING ADDRESS OF CREDIT CARD

FOR OBA USE ONLY—NW BANK OPS SCHOOL—2021-08-24

Received \_\_\_\_\_ Period \_\_\_\_\_ Customer \_\_\_\_\_
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