

# 2015 Northwest Bank Operations School

March - June 2015 | Embassy Suites - Portland Airport | Portland, Oregon



**Designed to enhance your understanding of  
your role within your financial institution.**

Compliance • New Accounts • Bank Security  
Employee Supervision • Sales • And more!



WASHINGTON  
BANKERS ASSOCIATION

# 2015 Northwest Bank Operations School

The redesigned Northwest Bank Operations School is sure to appeal to a wide array of participants with various levels of experience and roles within the banking industry. The program explores the issues facing bank operations personnel and provides an in-depth framework to examine the operations that support primary and ancillary bank services.

You have the option to register for the full program and receive a graduation diploma upon completion, or you can register for individual sessions to boost your knowledge in specific areas. Whether registered for the entire program or an individual session, you will leave with an enhanced understanding of your role within your financial institution.

## Who Should Attend?

**Full School:** Bank employees with less than five years of experience in bank operations.

**Individual Sessions:** Bank employees looking to boost their knowledge in specific areas.

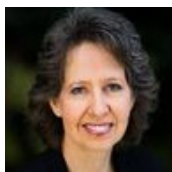
## Program Curriculum

### MARCH

**Tuesday, March 10, 2015 (9:00 am - 4:30pm)**

#### **Operations: The Center of it All**

*Presented by Vickie Cussins,  
SkillPoint Professional Solutions, LLC*



Utilizing her extensive, first-hand banking knowledge, Vickie Cussins will dive into the importance of *you*, in relation to your role in bank operations. How does your role intertwine with other areas of the bank? Why is your position crucial to the bank's overall success? This session will focus on the importance of your role in operations as *the center of it all*.

#### **Bank Financial Reports & Measurements**

*Presented by the Federal Deposit Insurance Corporation*



The Federal Deposit Insurance Corporation (FDIC) will review some of the key bank performance measurements and reports used by bank management, boards, investors, and/or regulators. Call report, UPBR, CAMELS, ALLL Efficiency Ratio...Learn what's behind the lingo and why it matters from an operations and regulatory perspective.

**Wednesday, March 11, 2015 (8:30 am - 12:00 pm)**

#### **Sales Culture & The Banking Customer of the Future**

*Presented by Dianne Barton, President & Founder, Performance Solutions, Inc.*

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.



### APRIL

**Tuesday, April 21, 2015 (9:00 am - 4:30pm)**

#### **New Accounts Workshop - Documentation & Compliance**

*Presented by Patrice Konarik, President & Founder, Sunwest Training Corp.*

Too often new account personnel receive just 20 minutes of training before opening their first account. Most of the expertise is gained "on the job" which results in an environment of insecurity and vulnerability for new account representatives and unnecessary losses for the financial institution. With all the new compliance regulations, it seems like we are now conducting new account "interrogations" rather than new account "interviews". This full day annual review teaches new account and operations personnel: proper account opening procedures and compliance requirements, the five crucial pieces of information including proper identification and the correct TIN for every new account, and the four fundamental questions that should be asked of every potential accountholder.



**Wednesday, April 22, 2015 (8:30 am - 12:00 pm)**

#### **Communication in the Workplace** *Presented by Gail Tycer, The Gail Tycer Company*

Gail Tycer's comfortable, can-do style and enthusiasm inspires audiences to put her practical business communication techniques to work immediately. This session will combine the essentials of written and spoken communication in the workplace into real-life scenarios to help you build your confidence and your career. Learn how to make your point quickly, clearly, and concisely, whether writing or speaking.





## Tuesday, May 19, 2014 (9:00 am - 4:30 pm)



### **Introduction to Operations Compliance** Presented by Amy Avitable, Director—Regulatory Compliance, Tata Consultancy Services

Join nationally recognized compliance expert, Amy Avitable as she tackles the topic of operational compliance. Amy will navigate through the ever-changing and multiplying regulations that you face every day, and will leave you with an understanding of the who's, what's, why's and how's of bank compliance.

## Wednesday, May 20, 2015 (8:30 am - 12:00 pm)

### **Employee & Company Safety & Security**

Presented by Marty Ogno, Security Agent, Wells Fargo Corporate Security

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 employees and company safe and secure, while discussing a few other timely topics such as incident types, statistics and methods of prevention.



### **Elder Financial Abuse**

Presented by Betsy Steinberg, AVP & Branch Manager III, Pioneer Trust Bank

Financial exploitation is the most frequently reported form of elder abuse. Oregon statutes contain a "safe harbor" for bankers to facilitate reporting suspected abuse, but there are also liabilities for not reporting. In this session, Betsy will discuss,

- Recognizing and reporting financial abuse
- Safe Harbors and liabilities concerning reporting
- Developing an elder abuse prevention program and response plan for your financial institution



## Tuesday, June 16, 2015 (9:00 am - 4:30 pm)

### **Employee Supervision: Rules of the Road**

Presented by Jill Faughender, VP & Human Resources Director, First Federal

Effective supervision starts on day one. This session will help you identify strategies for making the best supervisory impression on employees and offer best practices which will ensure that you are clearly communicating and managing performance expectations. Topics to be highlighted include:

- Supervisor/employee relationships
- Conflict resolution
- Employee development
- Company image



### **Employee Performance Reviews & Interviewing New Employees**

Presented by David Noland, President & General Counsel, HRCentral Corp.

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



## Wednesday, June 17, 2015 (8:30 am - 12:00 pm)

### **2015 Payment Trends & The Future Landscape**

Presented by Bill Schoch, CEO, WesPay

Continued economic challenges and the emergence of new technologies surprisingly present new revenue opportunities for financial institutions with electronic payments. As consumers seek greater convenience and businesses demand improved efficiencies, mobile payments may present the answer to both of these issues. This session will examine other payments trends that have developed in the past few years, which pose both opportunities and challenges for financial institutions.



### **The Importance of Industry & Community Involvement**

Presented by Steve Rice, OBA Chair, Executive Vice President, Umpqua Bank

"Community" plays a major role in the industry of community banking, and OBA Chair Steve Rice, executive vice president and director of SBA lending division, knows this first-hand. Steve will discuss the crucial role that continued advocacy and education play in community banking, and how YOU can get involved and stay involved.



"I'm very thankful to have been a part of the Bank Operations School this year, and will highly recommend it to anyone I know. Thank you for providing us the opportunity to see how this industry runs from different aspects."

Al Rojas, Oregon Pacific Bank, 2014 Program Graduate

**Registration Form**

**Cost**

**IBA/OBA/WBA Member Rates**

Full Program: \$1299, \$1399 after February 13\*\*  
 Additional Full Program Attendee: \$999, \$1099 after February 13\*\*  
 One-day Session (Tuesday) \$239\*\*  
 Half-day Session (Wednesday) \$109

**Non-Member Rates**

Individuals from non-member banks attending the program will be assessed a 25% surcharge.

All prices include course materials and refreshments.  
 \*\*Prices for the full program and one-day sessions include lunch.

**Hotel Accommodations**

For discounted lodging, please contact the Embassy Suites Portland Airport at (800) 821-5879 and reference the Oregon Bankers Association.

Send completed registration forms to:  
 Oregon Bankers Association  
 Attn: Education Department  
 PO Box 13429  
 Salem, OR 97309

**I would like to attend the following session(s): (check all that apply)**

- Full Program (all eight sessions from March - June)**
- Tuesday, March 10, 2015 (9:00 am - 4:30 pm)**  
(Operations: The Center of it All, Bank Financial Reports & Measurements)
- Wednesday, March 11, 2015 (8:30 am - 12:00 pm)**  
(Sales Culture)
- Tuesday, April 21, 2015 (9:00 am - 4:30 pm)**  
(New Accounts Workshop - Documentation & Compliance)
- Wednesday, April 22, 2015 (8:30 am - 12:00 pm)**  
(Communication in the Workplace)
- Tuesday, May 19, 2015 (9:00 am - 4:30 pm)**  
(Introduction to Operations Compliance)
- Wednesday, May 20, 2015 (8:30 am - 12:00 pm)**  
(Bank Security & Elder Financial Abuse)
- Tuesday, June 16, 2015 (9:00 am - 4:30 pm)**  
(Employee Supervision, Performance Reviews & Interviewing)
- Wednesday, June 17, 2015 (8:30 am - 12:00 pm)**  
(2015 Payments Trends and the Future Landscape & Community Involvement, Graduation Ceremony)

**Total Amount \$** \_\_\_\_\_

**Questions?** Contact OBA Education Coordinator Allison Newsom at (503) 576-4115 or [anewsom@oregonbankers.com](mailto:anewsom@oregonbankers.com).

**Registrant Information**

Name \_\_\_\_\_

Bank \_\_\_\_\_

Title \_\_\_\_\_

Address \_\_\_\_\_

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Phone \_\_\_\_\_

Email \_\_\_\_\_

**Method of Payment**

- Check       Bill Me       Visa / MasterCard  
(members only)

Credit Card #

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Expiration Date      3-Digit V Code

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Signature \_\_\_\_\_

Billing Address  
 (If different than above)