

# 2024-25 Oklahoma Bankers Association Strategic Plan

## Mission Statement

We Make Bankers Better!

## Vision Statement

The companion, voice and supporter of Oklahoma bankers

## Values

**PROTECT**

**UNITE**

**LEAD**

**SERVE**

**EDUCATE**

## Strategic Implications

- Internal and External Communications
- Member Engagement/Advocacy
- Delivery of Engaging Programs and Services
- Organizational Excellence

## Priorities

- Internal and External Communications
  - Utilize social media at an appropriate level
  - Create articles with deeper impact and stronger message
  - Engage bankers for content

- Emphasize OBA programs in content
- Tell the OBA story
- Member Engagement/Advocacy
  - Expand OBA branding
  - Increase bank visits
  - Solicit referrals from current members
  - Re-establish PAC Council
  - Communicate PAC impact to membership
- Delivery of Engaging Programs and Services
  - Provide education
  - Evaluate new instructors
  - Utilize strengths of school boards
  - Recruit quality candidates for intern program
  - Increase OBA staff-developed programs for fraud and compliance
- Organizational Excellence
  - Continue timely review of financial statements
  - Regular reporting of budget variances and trends to management team and board
  - Develop and maintain up-to-date job descriptions for staff and board
  - Develop and maintain an organization chart inclusive of individual roles
  - Monitor and track bank visits

## **Metrics and Proposed Initiatives**

### Internal and External Communications

#### **Metrics**

- XX posts on social media per XXXX
- 12 banker-collaboration articles per year in newspaper
- 1-2 banker/staff articles per *Update*

#### **Proposed Initiatives**

- Add forward button to digital communications
- Add digital version to print newspaper subscriptions (password required?)
- Increase 'hard' content in newspaper
- Increase practical banking content
- Utilize LinkedIn to position association as experts

## Member Engagement/Advocacy

### **Metrics**

- Maintain or reduce number of non-member banks
- Increase number of seminar/conference/school attendees in the current fiscal year compared to prior year
- Increase # of contributors to PAC
- Increase dollar amount of contributions to PAC
- 75% or more of all member banks have a one-on-one engagement with a member of the OBA management team
- 100% of all member banks have some sort of engagement (one to many) with a member of the OBA management team

### **Proposed Initiatives**

- Focus on banker-to-banker engagement
- Peer group lunches by board members for their group (OBA to help organize but not attend)
- Make GRC a requirement for board members (eliminates need for discussion in board meeting unless Board action needed)
- Explore change to BNO format to include lunch format to meet bankers close to their location and at their availability
- Change location of board meeting
- Re-establish PAC Council
- OBA Branded materials, e.g. t-shirts and swag
- Educate and inform bankers on how to engage
- Implement an official roster review process

## Delivery of Engaging Programs and Services

### **Metrics**

- Increase intern participants to a minimum of ten
- Increase banks participating in intern program to a minimum of 8
- All course evaluations have an average score of 4 or more
- Increase number of seminar/conference/school attendees in the current fiscal year compared to prior year
- Increase the number of sponsorships in the current fiscal year compared to prior year
- Increase the dollar amount of sponsorships in the current fiscal year compared to prior year

- Increase the number of strategic members in the current fiscal year compared to prior year

#### **Proposed Initiatives**

- Expand intern program beyond OU and OSU
- Expand intern program to include more than finance major
- Educate members about the added value of an internship program through the OBA
- Utilize school boards to find new instructors and/or be instructors
- Increase participation in OBA boards and committees by:
  - Proactively contacting bankers to serve
  - Clarifying roles and responsibilities
  - Encouraging board members to recommend individuals for service

#### Organizational Excellence

##### **Metrics**

- Obtain an unqualified audit opinion
- Maintain a budget variance of 10% or less for expenses
- Complete organizational chart with roles and responsibilities for each team member
- Complete job description for every team member
- Complete policies and procedures manual

##### **Proposed initiatives**

- Implement regular management meetings
- Routinely review financial results with management team
- Implement training for OBA staff
- Update job descriptions for all team members
- Update employee handbook
- Update policies and procedures manual