

2024 Operations School



**NOVEMBER 18-22, 2024 | HARRIS EVENT CENTER/OBA
OKLAHOMA CITY**

Oklahoma Bankers Association
643 NE 41st Street
Oklahoma City, OK 73105
405-424-5252



Purpose & Philosophy

The Oklahoma Bankers Association's Operations School is designed to prepare junior-level officers to mid-level operations managers to manage effectively and efficiently an operations function within a bank. Students are exposed to numerous concepts that impact your bank's bottom line. This is accomplished by providing the opportunity to:

- Develop a thorough understanding of key operations areas, their interrelationships and their contributions to profitability;
- Develop and apply analytical skills in proven techniques such as work flow analysis, financial analysis and quality indicators;
- Strengthen management skills in relation to human resource planning and motivational techniques;
- Become aware of the regulatory and competitive factors that affect banking today and the overall impact these environmental factors have on all operations functions;
- Evaluate state-of-the-art technologies within the banking industry that promote cost effectiveness, encourage new ideas, incite product creativity and enhance bank profitability.

Registration

Students will register at the Oklahoma Bankers Association's Harris Event Center from 9:00-9:30 a.m. on Monday, Nov. 18, 2024. All students are required to register during this period.

Enrollment Requirements

The school is designed for operation officers, supervisors, bank trainers and branch managers and their assistants. There is no limit to the number of employees any one bank can send to the school. However, enrollees should meet the following criteria:

- A college degree and two years of banking experience, or
- A high school diploma and five years of banking experience, with a minimum of one year in a supervisory capacity, or
- Equivalent coursework and demonstrated knowledge.

"To be nominated and accepted into the Oklahoma Bankers Association Operations School was an absolute honor. Between the variety of subjects, excellent teachers, wonderful OBA staff, and networking opportunities, I returned to work refreshed and invigorated. This opportunity allowed me to learn much more about the operational banking world than I ever had imagined. I would highly recommend this class to anyone wishing to move forward in the banking world or anyone who may need a refresher."
Amanda Harrell, Sovereign Bank, Shawnee

"The Oklahoma Bankers Association Operations School is a unique environment of lecture, practical application, and networking. I enjoyed the curriculum as every course promoted a healthy foundation into banking operations. Each instructor and discussion sparked fresh ideas to improve our home banks. Outside of the classroom, my favorite part was staying in the hotel and fostering relationships with fellow classmates. I would highly recommend the OBA Operations School to anyone wanting to expand their knowledge and influence in banking."
Lauren Bridgeman, The Bank of the West, Thomas

Class Organization

So that each student may gain the most from the course, enrollment is limited to 50 students. Formal classes will be held approximately 35 hours, Monday through Friday. The school will conclude by noon on Friday, Nov. 22, 2024. Bankers, attorneys, and consultants teach the course.

Requirements & Regulations

Each student will be required to attend every class until adjournment on Friday, Nov. 22, 2024. An attendance record will be kept and his or her respective bank will be notified at the close of the session if the student's participation is not satisfactory.

Additionally, an exam covering all of the topics discussed during the week will be given on Friday morning. All students are required to take the exam on Friday.

Dress

Dress for class is informal, but in good taste. Jeans are acceptable. Plan to bring a light sweater or jacket.

Accommodations

The Oklahoma Bankers Association has a block of rooms available at the Residence Inn by Marriott OKC Downtown. The hotel is located at 400 E Reno Ave, Oklahoma City, OK 73104. Please call 405-601-1700 and mention the **Oklahoma Bankers Association Operations School room block**. The \$120 room rate includes breakfast and parking. Reservations should be made by Saturday November 2, 2024 to guarantee this rate.

The Bottom Line

The cost for the one-week school is \$1,400 for OBA-members and \$2,800 for non-members. The registration fee covers daily lunches, snacks, a one-year subscription to the *Oklahoma Banker*, books and tuition. The fee must accompany the application and be received by the OBA by Nov. 1, 2024. Upon cancellation by Nov. 1, 2024, the full fee will be returned to the bank. A \$700 cancellation fee applies to refund requests received between Nov. 1 through Nov. 8. Cancellations received after Nov. 8, 2024 will be subject to forfeiture of the registration fees. All cancellations must be in writing.

EARLY BIRD REGISTRATION: Any registrant enrolling prior to Oct. 18, 2024, will be afforded the following discounted rate: **\$1,300** OBA members.

MULTIPLE REGISTRATIONS: Any OBA-member bank enrolling two or more students will be afforded the following discounted rate: **\$1,300** first student and **\$1,250** each additional student.

REGULAR REGISTRATION: Single registration fee after Oct. 20: **\$1,400** OBA-members
\$2,800 Non-members

Student Honors Program

Each year, the Board of Regents, staff, faculty and students select two students as the outstanding graduates. Criteria for the selection of the honor graduates include, but is not limited to: outstanding work on the case studies and test, contributions to and participation in class and overall contributions within the student body. Awards will be presented to these students once they have returned to their respective banks. Additionally, these two students will be asked to serve as advisory board members for the following year. **The recipients must be from OBA-member banks and reside in Oklahoma.**

School Board

Chairman:

Matthew Farve, First National Bank, Ardmore

Members:

Amy Biggs, Seiling State Bank, Seiling
Rhiannon Biggs, BancFirst, Lawton
Terry Costanza, Patrons Bank, N.A., Okmulgee
Chelsea Filer, Stride Bank, N.A., Enid
Iva Sadler, First Enterprise Bank, Oklahoma City
Leigh-Anne Taylor, NBC, Oklahoma City

Brianna Tyra, Great Plains Bank, Mangum
Beth Vowell, Mabrey Bank, Oklahoma City
Ryan Webb, Security Bank, Tulsa

Advisors:

Lauren Bridgeman, The Bank of the West, Thomas
Amanda Harrell, Sovereign Bank, Shawnee



OPERATIONS SCHOOL APPLICATION FOR ADMISSION

NOVEMBER 18-22, 2024

A check payable to the Oklahoma Bankers Association must accompany this application. This fee covers instruction, materials, tuition, refreshment breaks, lunch and a one-year subscription to *Oklahoma Banker*. The registration deadline is Nov. 1, 2024.

This institution does not discriminate with regard to race, color, sex or age.

REGISTRATION

Early Bird Registration

To qualify, you must enroll by October 18, 2024.

\$1,300 OBA Members

Multiple Registrations

To qualify, students must be from the same bank. (OBA Members)

\$1,300 First student

\$1,250 Each additional student

Regular Registration

After October 18, 2024

\$1,400 OBA Members

\$2,800 Non-OBA Members

REFUND POLICY

Any registrant withdrawing by Nov. 1, 2024, will receive a full refund. A \$700 cancellation fee will be charged for cancellation requests received on or after Nov. 1 through Nov. 8. Cancellations received after Nov. 8 will be subject to total forfeiture of fees.

ALL CANCELLATIONS MUST BE IN WRITING.

I, the undersigned, have read the attached information which describes admission criteria and understand that I will be expected to attend all scheduled classroom and work periods, to prepare all assigned work, to participate in classroom sessions and to successfully complete the final examination to qualify for graduation.

Signature _____

The submission of this application has been approved by the bank. (To be signed by the president, department head, personnel officer or other executive authorized by the bank.)

NOMINATING OFFICER'S SIGNATURE

NOMINATING OFFICER'S NAME AND TITLE

OPTIONAL

I consent to the release to my employer of grades and other measures of performance in courses taken by me at the school.

SIGNATURE DATE

Please send grades and other measures of performance to:

PLEASE TYPE OR PRINT THE FOLLOWING INFORMATION

NAME (AS YOU WANT IT TO APPEAR ON CERTIFICATE)

NAME OR FIRST NAME (FOR BADGE)

EMAIL ADDRESS

DATE OF BIRTH (MONTH/DAY/YEAR)

AGE

BUSINESS PHONE

MOBILE PHONE

YOUR TITLE

BANK'S CORE SYSTEM

BANK NAME

POST OFFICE BOX

CITY

STATE

ZIP

Application must be returned by November 1, 2024.

(OVER)

APPLICANT'S TITLE

SIZE OF BANK IN DEPOSITS

SIZE OF BANK IN ASSETS

TOTAL YEARS IN BANKING

(Check only one)

- 1. ___ President/CEO
- 2. ___ Executive VP/Sr. VP
- 3. ___ Vice Pres./Cashier
- 4. ___ Asst. VP/Asst. Cashier
- 5. ___ Vice President
- 6. ___ Asst. Vice President
- 7. ___ Compliance Officer
- 8. ___ Auditor
- 9. ___ Admin. Asst./Secy.
- 10. ___ Branch Manager
- 11. ___ Other (Specify) _____

- 1. ___ \$0-100mm
- 2. ___ \$100-250mm
- 3. ___ \$250-500mm
- 4. ___ \$500-750mm
- 5. ___ \$750-1 billion
- 6. ___ Over 1 billion
- 7. ___ Bank Holding Co.
- 8. ___ Other

- 1. ___ \$0-100mm
- 2. ___ \$100-250mm
- 3. ___ \$250-500mm
- 4. ___ \$500-750mm
- 5. ___ \$750-1 billion
- 6. ___ Over 1 billion
- 7. ___ Bank Holding Co.
- 8. ___ Other

- 1. ___ Less than 1
- 2. ___ 1-3 years
- 3. ___ 3-5 years
- 4. ___ 5-10 years
- 5. ___ 10-15 years
- 6. ___ 15 years & over

EDUCATIONAL BACKGROUND

(Check only one)

- 1. ___ High School Graduate
- 2. ___ Some College (Hrs _____)
- 3. ___ Associate Degree
- 4. ___ Bachelor's-Business
- 5. ___ Bachelor's-Other
- 6. ___ Masters-Business
- 7. ___ Masters-Other
- 8. ___ Ph.D.
- 9. ___ Law Degree

OBA SCHOOLS ATTENDED

YEAR

- 1. ___ Compliance _____
- 2. ___ Consumer Lending _____
- 3. ___ Operations _____
- 4. ___ Commercial Lending _____
- 5. ___ Intermediate _____
- 6. ___ Basic _____

BUSINESS EXPERIENCE

List in chronological order your banking and other business experience. Include dates, bank and other business firms and a brief description of duties.

Briefly describe your major responsibilities in the bank.

EMERGENCY INFORMATION

In case of emergency, please contact:

NAME	ADDRESS	MOBILE PHONE
RELATIONSHIP	WORK PHONE	

Please make your check payable to the Oklahoma Bankers Association and mail to:

Oklahoma Bankers Association
P.O. Box #960173
Oklahoma City, OK 73196-0173

Contact Janis or Nancy for further information at 405-424-5252 or at janisr@oba.com.

FOR OBA USE ONLY

Rec'd	Rt#	By	Amt.	#	k	C
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2024 Operations School

Monday, Nov 18							Tuesday, Nov 19							Wednesday, Nov 20							Thursday, Nov 21							Friday, Nov 22													
							<p>9:00 -9:30 Registration</p> <p>9:30 – 10:00 Class Overview & Ice Breaker</p>							<p>9:00 – 10:30 Bank Financial Analysis</p>							<p>9:00 – 11:00 Bank Investments Overview/ Asset Liability Fundamentals</p>							<p>9:00 – 10:15 Bank Operations Law</p>							<p>9:00 – 10:00 Exam</p> <p>10:15 Photo Session</p>						
							<p>10:00 – 10:45 Banking Marijuana Related Businesses</p> <p>11:00 – 12:30 BSA</p>							<p>Break 10:30 – 10:45</p> <p>10:45 – 11:45 --continued--</p>							<p>Break 11:00 – 11:15</p> <p>11:15 – 12:30 Fee Income/Expense Control</p>							<p>Break 10:15 – 10:30</p> <p>10:30 – 11:30 Vendor Management/ Risk Management</p>							<p>10:30 OBA Update</p> <p>11:00 Exam Review</p> <p>11:30 School Adjourns</p>						
<p>Lunch 12:30 – 1:00 Lunch sponsored by Mabrey Bank</p>							<p>Lunch 11:45 – 12:45 Lunch sponsored by The Bankers Bank</p>							<p>Lunch 12:30 – 1:15 Lunch sponsored by Banc Card of America</p>							<p>Lunch 11:30 – 12:15 Lunch sponsored by BancFirst</p>																				
<p>1:00 – 2:15 BSA -continued-</p>							<p>12:45 – 2:00 Effective Written Communication</p>							<p>1:15 – 2:30 Operations Compliance Update</p>							<p>12:15 – 1:45 Human Resources/Coaching/ Employment Issues</p>																				
<p>Break 2:15 – 2:30</p>							<p>Break 2:00 – 2:15</p>							<p>Break 2:30 – 2:45</p>							<p>Break 1:45 – 2:00</p>																				
<p>2:30 – 5:00 Bank Security/Fraud/Internal Controls</p>							<p>2:15 – 3:30 Technology Update: Risks and Cybersecurity POAs and Trusts</p> <p>3:40 – 5:10 Exam Review</p>							<p>2:45 – 4:00 Faster Payments Business Continuity Planning</p>							<p>2:00 – 3:00 Leadership During Crisis Customer Service</p> <p>3:15 – 4:30 Exam Review</p>							<p>*School subject to minor changes. 8/21/24</p>													