# 2021 OBL Bank Management School

**Sunday, October 3 - Friday, October 8, 2021**
**OBL Education Center**

## School Schedule

**SUNDAY, October 3**
**12:30 - 6:30 p.m.**

**MONDAY, October 4**
**8 a.m. - 5:30 p.m.**

**TUESDAY, October 5**
**8 a.m. - 5 p.m.**

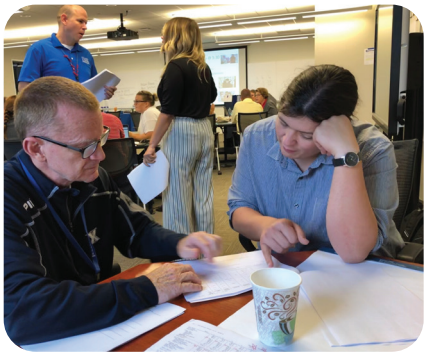
**WEDNESDAY, October 6**
**8 a.m. - 6 p.m.**

**THURSDAY, October 7**
**8 a.m. - 6 p.m.**

**FRIDAY, October 8**
**8 a.m. - 1 p.m.**

Please Note: Extended breaks are scheduled accordingly each day.

**Register today using the enclosed form.**






In today's ever-changing banking environment, it is important for bankers - especially those who have potential to rise within their institution - to have a clear understanding of the bank as a whole. The OBL Bank Management School is a comprehensive program that includes sessions on financial management essentials, asset liability management and liquidity management, bank investments, consumer behavior and cybersecurity, as well as an opportunity that allows participants to make the tough decisions involved when running a bank.

## The Purpose

The OBL Bank Management School provides bankers with:

- An enhanced understanding of the financial services industry and the inter-relationships of each banking function;
- An opportunity to better serve both customers and the bank through expanded knowledge and ability;
- An opportunity to improve leadership and effectiveness;
- The necessary skills to improve bank productivity, profitability and competitiveness; and
- A statewide peer network of financial industry professionals.

Please note: Advance coursework is required.

## An Overview

Classroom lectures, case studies, computer-based simulations and networking are used to enhance learning and promote student interaction. Under the direction of Anthony McGill, an independent senior banking consultant, teams of students manage a bank through eight decision periods before holding a session-ending shareholder meeting to discuss individual bank performance over the course of the simulation. Check the OBL website for more details regarding the internet-based BankSim program.

## Who Should Attend

Employees at nearly every level can benefit from the 2021 OBL Bank Management School. The thorough, hands-on approach makes it essential for management bound employees and/or trainees; anyone interested in the holistic view of running a bank and/or the basics of bank management.

Experienced managers who are new to the banking industry and experienced bank officers will also benefit from the innovative and thought-provoking curriculum.

*LEFT: Lead Instructor Anthony McGill assists student Josh Hook, The First Citizens National Bank of Upper Sandusky, during the 2019 OBL Bank Management School.*

# 2021 OBL Bank Management School

## The Benefits of Attending the 2021 OBL Bank Management School

The faculty are top-quality banking colleagues and veterans who will provide opportunities to ask questions, share concerns and learn from the best.

Students receive an information-packed electronic manual for each module containing learning concepts and resource materials.

Classmates share ideas, concerns and solutions with other participants from similar institutions.

Graduates return as a valuable asset to the bank and management team with a comprehensive and practical overview of banking.

The 2021 OBL Bank Management School is excellent training for those interested in gaining a competitive edge for your career and your institution.



## School Highlights

### Asset Liability Management & Liquidity Management

Learn how banks use ALM and liquidity management to minimize interest rate risk and liquidity risk and how they are an integral part of the financial management process of any bank.

### Peer Analysis Tools for Banks

Learn how peer analysis helps banks identify triggers and drivers to understand its business, competitors and the markets, providing opportunity for growth. Peer benchmarking metrics, as well as various peer benchmarking tools will also be discussed.

### Financial Management Essentials

Learn about the fundamentals of financial management as well as a discussion of the key financial statements used in banking: Balance Sheet, Income Statement and Statement of Cash Flow. Students will also get a look at the most common financial ratios used by all banks.

### Bank Investments

Take a look at the instruments and markets for a bank's investment portfolio and examine the investment portfolio in relation to the overall balance sheet. See how bank investments play a key role in earnings, liquidity, borrowing and capital.

### The Emerging Consumer

This course will help bankers navigate the convergence of shifting demographics, new delivery technologies and changing consumer behaviors and lay the foundation for building a data driven strategy for growth. This session will outline the vital demographic research, trends in delivery technology and best practices necessary for stronger alignment of products, services and channel strategies with consumer expectations.

### Team Building

One of the core components of this program is running the Bank Executive Simulation on a bank team. Team building exercises and activities will play a crucial role in learning to work with this newly formed group, and also provide a skill base to apply in real-life scenarios.

### CyberSecurity

Data security and ongoing threats are never-ending. This cybersecurity 101 session teaches the essentials to protecting your bank from cybercrime as you learn about the latest threats and responses that you and your colleagues need to know – no matter your role at the bank.

### CEO Community Banking Panel Discussion

Discuss common questions and current issues relating to bank financial management with top Ohio banking industry leaders.

### Bank Executive Simulation

A computer-based bank simulation gives participants exercises in bank management through student teams. Topics include interest-rate sensitivity, asset liability and management, capital adequacy, goal setting, leadership skills, investment and lending policies, priority definitions, accounting policies and forecasting. (Learn more on page 3 of this brochure.)

### Career Development

High potential bank employees like the ones at this program must think about their banking career and how it fits into the succession plan of their institution, and how these bankers might better prepare for and plan their climb up the corporate ladder. Learn skills and tips from an expert in career planning. Includes insight into managing others.

### And More!

### About the Instructors

Instructors represent former and current senior banking executives, distinguished academicians and highly regarded industry consultants. The Bank Executive Simulation is led by Anthony McGill, an independent senior banking consultant who formerly served as an executive vice president with U.S. Bank.

LEFT: *Students work in their bank simulation teams to make eight quarterly decisions throughout the program.*

## What to Expect During Bank Executive Simulation

Prior to the School, students will be divided into work groups. Upon arrival, students will select key roles (CEO, CFO, Investment Officer, Lending Officer, Deposit Officer and Treasury Officer) to play for the week, where they will have an opportunity to make "real-life" executive decisions on how to run a bank - all in a risk free environment. The internet-based Bank Executive Simulation helps the participants understand risk based capital, asset and liability management, relationship in pricing alternatives for deposits and loans, and the alternative allocation of funds to purchase various investment opportunities.

The simulation requires the use of team skills, negotiation and persuasion. It engages each participant in the dynamics of teamwork and develops the decision making process, as the teams establish objectives and develop strategies to accomplish their goals. By graduation, students understand the financial statement components of a typical bank, as well as the impact changes in the economy have on the profitability of a bank. In addition, each student gains a network of people with whom to connect and exchange ideas.

## The OBL Bank Management School meets 100 percent of student expectations year after year!

### What do students have to say about the overall Bank Management School?

- *The information from this program is invaluable for those moving into leadership positions.*
- *Everything was new to me – and definitely a learning experience!*
- *This valuable information should be a requirement for those expected to move into any management role within the bank.*
- *The class makes everything "click."*
- *The knowledge taken away from this week is information that is critical in our industry.*
- *There is a lot of learning that was outside the box of the normal day-to-day routine. The information exceeded my expectations.*
- *I came away with a huge knowledge base.*
- *The quarterly bank simulation decisions allowed for team collaboration.*
- *The format of the class allowed for a lot of learning in the banking environment.*
- *The school provided an opportunity to gain overall banking knowledge and strategy, and to hear from topical speakers. Plus, working with other bankers was very beneficial.*
- *I learned more than I knew there was to learn!*
- *This program put me in others' shoes and helped me to understand all the functions of a bank better.*
- *The class was engaging. I learned a lot from the bank simulation – and the speakers were great.*
- *The program provided insightful information to the world of banking and the sessions provided a peek into the side of the bank than one rarely gets the chance to see.*
- *This program was top notch! I gained knowledge from presenters and the importance behind their topics – and made connections in the banking industry, too!*

### What do students have to say about the lead instructor, Anthony McGill?

- *The wealth of knowledge that I gained from this class and instructor Anthony McGill was incredible. I am thankful for having a chance to learn from him!*
- *Anthony is educated, witty and relaxed – a great instructor!*
- *He kept the program interesting and engaging and added humor into learning. I actually wanted to be here!*
- *Anthony is absolutely FANTASTIC! He is knowledgeable and is easy to listen to during lecture.*
- *Anthony answered all the questions – and was patient with every student. He explained everything in-depth and made sure we understood.*
- *The instructor helped as necessary, but allowed us to "test" our knowledge.*

**Find out for yourself! Register Today!**

## Advance Coursework

Each student will be required to complete two projects in advance of the School.

The first is a Leadership Extension Project that asks bankers to reflect upon a change that has occurred in their institution within the past five years. Students are asked to place themselves in the role of a key decision maker and identify how they might have personally managed the project and what outcomes might have changed. Based on a John P. Kotter article in Harvard Business Review, Leading Change: Why Transformation Efforts Fail, this project will assist bankers in identifying, evaluating and planning for future change in their organization.

**Due: Friday, September 3, 2021**

The second Bank Executive Simulation Project uses financial statements, report reviews and situation analysis to prepare students for the bank simulation part of the School. Students are not expected to complete this project alone; rather they are encouraged to partner with senior officers and/or former Blythe School of Banking/OBL Bank Management School alumni for assistance.

**Due: Friday, September 24, 2021**

**Contact Susan Poling Jones at 614-340-7611 today for more information.**

# 2021 OBL Bank Management School Registration

## Admission Application

### 2021 OBL Bank Management School - October 3 - October 8, 2021

Please copy this form for additional registrations. Registration is also available online at www.ohiobankersleague.com.

**School Tuition (select one)**

- ❑ $1,595 OBL member
- ❑ $3,190 nonmember

**Hotel Accommodations (select one)**

- ❑ $425 double occupancy*
- ❑ $850 single occupancy*
- ❑ No occupancy

**The Bank Simulation Program is internet-based. It is not required that you bring technology to the program, however it will help with our planning to know in advance:**

❑ Yes, I can bring a laptop or iPad to the school. ❑ No, I cannot bring a laptop or iPad to the school.

**I have been in the banking industry for _____ months/years.**

**I have been in my current position for _____ months/years.**



NAME

BANK

TITLE

MAILING ADDRESS

CITY STATE ZIP

COUNTY

PHONE CELL PHONE

FAX

E-MAIL

SPECIAL ASSISTANCE / DIETARY NEEDS

ROOMMATE REQUEST

**Method of Payment**

- ❑ My full-payment check for $_____ is enclosed.
- ❑ Please charge my credit card $_____ as noted below.
  - ❑ Visa ❑ MasterCard
  - ❑ Discover ❑ AmEx

CARD NUMBER

EXPIRATION DATE

CARDHOLDER NAME

BILLING ADDRESS

CARDHOLDER'S SIGNATURE

CVV NUMBER (3 DIGITS ON BACK OF CARD)

Please send check and registration to: Ohio Bankers League/Attention: 2021 OBL Bank Management School
4215 Worth Avenue, Suite 300, Columbus, Ohio 43219 Fax 614-340-7596/Phone 614-340-7595

CONFIRMATION WILL BE SENT UPON RECEIPT OF YOUR REGISTRATION. PLEASE USE THIS FORM AS YOUR INVOICE.

*Hotel accommodations are at the brand new TownePlace Suites Columbus Easton.

## Registration & Cancellation Policy

Registration is transferable, however refunds will only be granted for cancellations received in writing to education@ohiobankersleague.com by Sept. 3 Cancellations will be subject to a $100 processing fee. No refunds or credits will be granted for cancellations received after Sept. 3.

For more information, contact Education Manager Susan Poling Jones, at spoling@ohiobankersleague.com or 614-340-7611.



OBL Ohio Bankers League

4215 Worth Avenue
Suite 300
Columbus Ohio 43219
Phone 614-340-7595
Fax 614-340-7596
www.ohiobankersleague.com

LEFT: The graduating class from the 2019 OBL Bank Management School. Thousands of Ohio bankers have graduated from this program since its inception, many of whom are now senior-level executives, serving as presidents or chief executive officers of financial institutions both large and small.