

A photograph of a city skyline at sunset, with tall buildings illuminated by warm lights and their reflections on a body of water in the foreground. The sky is a mix of blue and orange.

# PATHWAYS TO

**VBA**  **CONNECT**  
AND  
**VBA**  **PROTECT** 

A map of the Richmond, Virginia area, showing major highways like I-64, I-95, and I-295, and surrounding locations like Sandston and Midlothian.

## PARTICIPANT GUIDEBOOK

**VIRGINIA BANKERS  
ASSOCIATION**

# WELCOME TO PATHWAYS!



## MAIN VBA CONTACTS

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## VISIT THE PATHWAYS ATTENDEE HUB FOR:

- Listing of all virtual sessions with session descriptions
- Links to register for virtual sessions
- Materials for virtual sessions
- Digital version of the Pathways Participant Guidebook
- Speaker Bios
- Sponsor contacts and information

**CLICK HERE TO ACCESS THE ATTENDEE HUB**  
**VABANKERS.ORG/PATHWAYSHUB**

## TIPS FOR SUCCESS IN THE PATHWAYS TO CONNECT & PROTECT PROGRAM

### BEFORE THE SESSION:

1. Complete the Mapping Out Your Journey exercise on the next page either on your own or with your team. As a part of that exercise, review the session descriptions and takeaways to identify the best sessions for you to attend based on your personal goals and the strategic priorities of your organization.
2. Register for the sessions you want to attend using the Zoom links on the Attendee Hub
3. Familiarize yourself with the presenters chosen to facilitate the Pathways sessions and with the sponsors who are supporting the program.

### DAY OF THE SESSION:

1. Open the Attendee Hub and download/print the session materials, if available.
2. Review the roster of attendees to familiarize yourself with the other session participants.
3. Practice active listening during the session and take detailed notes for follow-up discussion with your team or others in your organization.

### POST-SESSION:

1. Review your notes and reflect on what you learned during the session.
2. Think about how what you learned impacts your personal goals or your organization's strategic priorities.
3. Identify what/with whom you would like to share what you learned.

MARKETING



TRAINING



RETAIL



HUMAN RESOURCES



SECURITY



OPERATIONS & TECHNOLOGY



ENTERPRISE RISK MGMT.



COMPLIANCE



# MAPPING OUT YOUR JOURNEY



Either on your own or with your teammates who are also attending Pathways to VBAConnect and VBAPROTECT, look at your bank's strategic priorities and answer the questions below. Use this information to map out your VBA Pathways to Connect and Protect journey.

What are your bank's or organization's current goals and strategic objectives?

1

What are your personal and professional development goals?

2

What programs, initiatives, or strategies do you hope to explore

3

Based on boxes 1, 2 and 3, write down any questions you hope to answer or information you hope to gather through your participation in the VBA Pathways to Connect and Protect sessions.

4

Using the information above, create your event participation strategy. Either on your own or in consultation with your colleagues who are also attending VBA Pathways to Connect and Protect, review the sessions on the following pages and check off the ones you plan to attend and click the link to register for those you selected.

# VBACONNECT VIRTUAL SESSIONS

	MARKETING	RETAIL	TRAINING	HR
MAY	<p>MAY 3</p> <p><b>Reimagining Your Marketing Strategy in the Post-COVID World</b> <i>Martha Bartlett Piland</i> BANKTASTIC</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>MAY 10</p> <p><b>How to Re-Engage Your Team After a Pandemic</b> <i>Rachelle Humiston</i> Haberfeld</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>MAY 17</p> <p><b>Creating a Culture of Agility</b> <i>Wendy Berensen</i> InnerWill</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>MAY 24</p> <p><b>Legal Hot Topics</b> <i>Tevis Marshall</i> Ogletree Deakins</p> <p><input type="checkbox"/> WILL ATTEND</p>
JUNE	<p>JUNE 7</p> <p><b>The Magic of Marketing Automation is Doing More With Less</b> <i>Hunter Young</i> HiFi Agency</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>JUNE 14</p> <p><b>Eliminating the One-Size-Fits-All Approach: Building Modern Financial Experiences Through a Partner Marketplace</b> <i>Dean Jenkins</i> Q2</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>JUNE 21</p> <p><b>Diversity &amp; Inclusion - Getting to BE CLEAR</b> <i>Delphia Howze</i> D. Howze Solutions, LLC</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>JUNE 28</p> <p><b>Attracting and Retaining Talent in the Post-COVID World: Lessons Learned and Best Practices</b> <i>Kate Shattuck</i> Korn Ferry</p> <p><input type="checkbox"/> WILL ATTEND</p>
JULY	<p>JULY 6</p> <p><b>Making Your Digital Dollar Count</b> <i>Kristin Sundin-Brandt</i> Sundin Associates</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>JULY 12</p> <p><b>Clicks &amp; Bricks: Blending the Convenience of Technology with the Branding Power of Brick &amp; Mortar</b> <i>Erin Campbell</i> PWCampbell</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>JULY 19</p> <p><b>Making Micro Work: 4 Approaches to Microlearning and Tips to Add Value for Your Learners</b> <i>Carla Torgerson</i> TorranceLearning</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>JULY 26</p> <p><b>Building Culture by Intention Amid Remote &amp; Hybrid Workforce Model Shifts</b> <i>Juan Luis Betancourt</i> Humantelligence</p> <p><input type="checkbox"/> WILL ATTEND</p>
AUGUST	<p>AUGUST 9</p> <p><b>Mining for Gold: Driving Results with Your Data</b> <i>Robb Rempel</i> Haberfeld</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>AUGUST 16</p> <p><b>Consumer Retail Banking Trends</b> <i>Rob Reale</i> IFM</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>AUGUST 26</p> <p><b>Learning &amp; Development Roles Post Pandemic</b> <i>Liz Schaefer</i> Korn Ferry</p> <p><input type="checkbox"/> WILL ATTEND</p>	<p>AUGUST 30</p> <p><b>HR Must Influence the Strategy, Not Just Implement It</b> <i>Tim O'Rourke</i> Pearl Meyer &amp; Partners, LLC</p> <p><input type="checkbox"/> WILL ATTEND</p>



# VBAPROTECT VIRTUAL SESSIONS

	OPS & TECH	SECURITY	ERM	COMPLIANCE
MAY	MAY 4 <b>Stay Ahead of the Digital Demand</b> Greg Varnell Q2	MAY 11 <b>2021 Cybersecurity Outlook</b> Brendan McGowan Safe Systems	MAY 18 <b>2021 and Re-Energized Bank Examination: What to Expect</b> Tim Naughton Strategic Risk Associates	MAY 25 <b>Legal Update</b> DeMarion Johnston Virginia Bankers Association
	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND
JUNE	JUNE 8 <b>Five Faster Payments Updates from a Community Bank Insider</b> DJ Seeterlin Chesapeake Bank	JUNE 15 <b>Outside the Box: Groundbreaking Innovations in Bank Security</b> Jeff Trimble & Rebecca Cicarelli BranchServ	JUNE 22 <b>ALCO and Balance Sheet Management in the Era of COVID-19</b> Al Forester Empyrean Solutions	JUNE 29 <b>Fair Lending Hot Spots</b> Margaret Dolinger & Steve Houchens TCA
	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND
JULY	JULY 7 <b>Elevating Your Fraud Prevention Strategies*</b> Ryan Dutton SHAZAM  <small>*THIS SESSION <b>WILL NOT</b> BE RECORDED AND SESSION MATERIALS <b>WILL NOT</b> BE SHARED</small>	JULY 13 <b>Civil Unrest - Considerations for Threat Mitigation, Safety and Business Continuity*</b> Chris Gagne US Secret Service  <small>*THIS SESSION <b>WILL NOT</b> BE RECORDED AND SESSION MATERIALS <b>WILL NOT</b> BE SHARED</small>	JULY 20 <b>Understanding SOC Audit Reports</b> Bryan Newlin YHB CPAs & Consultants	JULY 27 <b>Banking Cannabis Customers</b> Mike Bresnick & Andrew Bigart Venable LLP
	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND
AUGUST	AUGUST 10 <b>Strategic Risk Taking</b> Lenn Freeman Genesys	AUGUST 17 <b>How to Illuminate Your Cybersecurity Blindspots Before Hackers Do It For You*</b> Alex Heid Gradient  <small>*THIS SESSION WILL ALSO INTEREST OPS &amp; TECH ATTENDEES</small>	AUGUST 27 <b>Managing Climate Change Risk within the ERM Program</b> Mike Cohn WolfPAC Solutions Group	AUGUST 31 <b>Long and Winding Road: LIBOR's Transition</b> Elizabeth Madlem Compliance Alliance
	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND	<input type="checkbox"/> WILL ATTEND

# REIMAGINING YOUR MARKETING STRATEGY IN THE POST-COVID WORLD

MARTHA BARTLETT PILAND, BANKTASTIC

YOUR NOTES:

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KEY TAKEAWAYS/ACTION ITEMS:

- 1. Why the need to differentiate your brand is more vital than ever before—and how to go about it.
- 2. The importance of renewed focus on seamless brand experience across all channels: paid, owned, earned and in person.

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HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Wynde Walker**  
wwalker@collegeave.com | (571) 243-4985

**About College Ave | [www.collegeavestudentloans.com](http://www.collegeavestudentloans.com)**  
The College Ave Student Loan Referral Program allows Virginia banks to refer customers with private student loan needs to College Ave for funding, disbursement and servicing. In return, banks receive a referral fee. College Ave has multiple student loan products that provide a better student loan experience for your customers.

# THE MAGIC OF MARKETING AUTOMATION IS DOING MORE WITH LESS

HUNTER YOUNG, HIFI AGENCY

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

1. Define the places marketing automation will make most sense in the organization.
2. Understand how data and customer journeys inform smart marketing automation.
3. Create an internal roadmap for onboarding, lead nurturing, and relationship expansion via marketing automation.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Jake Finlinson**

jake@teachbanzai.com | (214) 417-9426

### About Banzai! | [www.teachbanzai.com](http://www.teachbanzai.com)

Banzai is an education platform with a focus on financial literacy. They serve communities by providing unparalleled financial literacy education to schools, and they serve their partners by providing access to invaluable marketing insights and meaningful CRA opportunities.

# MAKING YOUR DIGITAL DOLLAR COUNT

KRISTIN SUNDIN BRANDT, SUNDIN ASSOCIATES

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Attendees will be able to identify what reports should be available to them, how to identify which metrics to focus on (and which to ignore) and other ways to measure success.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Philip Edwards**  
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**About Works24 | [www.works24.com](http://www.works24.com)**  
Works24 specializes in digital media marketing solutions, primarily to financial institutions. The array of products they offer focus on internal marketing to maximize communications to existing customers and prospects while on hold, waiting in a lobby or at the drive thru. Their products include OnHold messaging, Video Cross-Production (VXP), touchscreen applications, website video and overhead music.



# MINING FOR GOLD: DRIVING RESULTS WITH YOUR DATA

ROBB REMPEL, HABERFELD

## YOUR NOTES:

## KEY TAKEAWAYS/ACTION ITEMS:

1. Understand how a financial institution's current retail and business customer data can be utilized to grow core customers.
2. Review how big data can be deployed to target prospective customers.
3. Identify internal opportunities to increase core deposits, fee income and product utilization
4. Discuss specific strategies to enhance internal execution with customers and prospects.

## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

THIS SESSION IS GENEROUSLY SPONSORED BY:



**Grand Ossenkop**

grant@haberfeld.com | (402) 323-3605

### About Haberfeld | [www.haberfeld.com](http://www.haberfeld.com)

Haberfeld is America's premier customer acquisition and engagement firm, having helped financial institutions acquire more than 10 million new relationships. The success of Haberfeld's strategy is founded on in-depth understanding of the true value of retail and business customers, cross-sell, fee revenue, omni-channel marketing, and data analytics.

# HOW TO RE-ENGAGE YOUR TEAM AFTER A PANDEMIC

RACHELLE HUMISTON, HABERFELD

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Explore the relationship between creating value and employee retention.
- 2. Evaluate specific leadership principles designed to grow your team leaders.
- 3. Understand how specific, actionable tools such as weekly team meetings, check-in's and observation coaching enhance performance.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**About College Ave | [www.collegeavestudentloans.com](http://www.collegeavestudentloans.com)**  
The College Ave Student Loan Referral Program allows Virginia banks to refer customers with private student loan needs to College Ave for funding, disbursement and servicing. In return, banks receive a referral fee. College Ave has multiple student loan products that provide a better student loan experience for your customers.

# ELIMINATING THE ONE-SIZE-FITS-ALL APPROACH: BUILDING MODERN FINANCIAL EXPERIENCES THROUGH A PARTNER MARKETPLACE

DEAN JENKINS, Q2

YOUR NOTES:

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KEY TAKEAWAYS/ACTION ITEMS:

- 1. Understand how to model the opportunity for FinTech partnerships for your business portfolio.
- 2. Evaluate your current digital offering for businesses against what it could look like with the inclusion of FinTech partnerships.
- 3. Assess impact if competitors start offering a holistic financial experience in the markets served by the bank.

WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**Dave Waller**  
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**About Q2 | [www.q2.com](http://www.q2.com)**  
Q2 is a financial experience company dedicated to providing digital banking and lending solutions to banks, credit unions, alternative finance, and fintech companies in the U.S. and internationally. With comprehensive end-to-end solution sets, Q2 enables its partners to provide cohesive, secure, data-driven experiences to every account holder – from consumer to small business and corporate.



# CLICKS & BRICKS: BLENDING THE CONVENIENCE OF TECHNOLOGY WITH THE BRANDING POWER OF BRICK & MORTAR

ERIN CAMPBELL, PWCAMPBELL

YOUR NOTES:

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KEY TAKEAWAYS/ACTION ITEMS:

- 1. Attendees will be able to correctly assess their current in-branch technology profile.
- 2. Identify opportunities for implementation of in-branch technology to improve the overall customer experience, capture younger generations, and boost brand perception.
- 3. Effectively utilize the retail branch network to augment the online channel.

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HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Erin Campbell**  
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**About PWCampbell | [www.pwcampbell.com](http://www.pwcampbell.com)**  
PWCampbell, widely respected in the financial services industry, is a family-owned retail services and design-build firm. Founded in 1910, they provide retail branding, merchandising, technology solutions, planning, design and construction expertise to optimize branching efforts. They have the knowledge and expertise to develop and implement engaging, impactful and scalable solutions for every sized project.

# CONSUMER RETAIL BANKING TRENDS

ROB REALE, IFM

## YOUR NOTES:

## KEY TAKEAWAYS/ACTION ITEMS:

## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

THIS SESSION IS GENEROUSLY SPONSORED BY:



**Billy Hicks**

billy.hicks@harlandclarke.com | (540) 315-0087

### About Harland Clarke | [www.harlandclarke.com](http://www.harlandclarke.com)

Harland Clarke is a leading provider of customer engagement solutions that help connect businesses and people how, when, and where it matters. The company offers payment tools such as checks and cards and marketing services such as deposit and loan acquisition programs, digital marketing, performance analytics and promotional products for businesses. It deploys these solutions holistically, across print, phone, and digital channels, ensuring that the customers of its world-class client base enjoy a consistently superior experience.





# CREATING A CULTURE OF AGILITY

WENDY BERENSEN, INNERWILL

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Increasing awareness of the factors which lead to a need for increased agility.
- 2. To discover strategies that will increase agility, adaptability, and creativity in the workplace.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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Webinar training offers a flexible solution to meet your Financial Institution’s needs. Save time by using webinar training to train your employees more efficiently. Our 2-hour programs permit trainees to spend as little time away from the office as possible. Since they can train right from their desk, there is no time spent traveling! You can also choose pre-recorded webinars from our extensive on-demand library.

Visit [BankWebinars.com/VABA](https://BankWebinars.com/VABA) for a complete list of upcoming and on-demand webinars. Contact Walt Lyons ([wlyons@vabankers.org](mailto:wlyons@vabankers.org) or 804-819-4746) to learn about subscription opportunities!

# DIVERSITY & INCLUSION - GETTING TO BE CLEAR

DELPHIA HOWZE, D. HOWZE SOLUTIONS, LLC

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Attendees will be able to speak clearly about the intent and opportunities regarding D&I in their organization.
- 2. Understand the benefits and best practices of effectively incorporating D&I in employee life-cycle.
- 3. Utilize a 5-step roadmap that will support efforts to embark on the strategic D&I journey.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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### **Core Compliance Suite** *Brought to you by the VBA and OnCourse Learning*

Keeping up with ever-evolving regulatory compliance risks and requirements gets more complex every year. With our Core Compliance Suite you can rest easy knowing your compliance team is getting real expertise by one of the most trusted experts in the field - Carl Pry.

Contact Walt Lyons (wlyons@vabankers.org or 804-819-4746) to learn more about this program!

# MAKING MICRO WORK: 4 APPROACHES TO MICROLEARNING AND TIPS TO ADD VALUE FOR YOUR LEARNERS

CARLA TORGERSON, TORRANCELEARNING

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Identify four use cases where you can use microlearning.
- 2. Develop effective microlearning assets for each of these four kinds of microlearning.
- 3. Use microlearning to make the greatest impact in your curriculum.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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### The Directors Education Series *Brought to you by the VBA and OnCourse Learning*

The responsibility and liability of the Bank Director is ever increasing. It is critical your Directors stay current with the training to help them through the complexities of today's banking environment. Check out The Directors Educations Series to start training your board of directors more efficiently today. Contact Walt Lyons (wlyons@vabankers.org or 804-819-4746) to learn more!

LIZ SCHAEFER, KORN FERRY

AUGUST 26, 2021 | 2:00 PM

[illegible][illegible][illegible][illegible]

# LEGAL HOT TOPICS

TEVIS MARSHALL, OGLETREE DEAKINS

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Attendees will have a better understanding of how to handle COVID-19 issues in the workplace.
- 2. Attendees will obtain a high-level overview of some of the recent employment-related laws enacted in Virginia over the last year.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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VBA's Career Center partner, BankTalentHQ, provides accelerated growth and expanded services for VBA member banks through their partnership with Circa as they put diversity and inclusion in the forefront of the recruiting process. Through niche diversity sites and community-based recruiting, greater opportunities are now opened up for you to reach the candidates that your bank is searching for!

Visit [www.vabankers.org/career-center!](http://www.vabankers.org/career-center!)



# ATTRACTING AND RETAINING TALENT IN THE POST-COVID WORLD: LESSONS LEARNED AND BEST PRACTICES

KATE SHATTUCK, KORN FERRY

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

1. Recruitment and onboarding best practices.
2. Designing an inclusive recruitment process.
3. Onboarding lessons learned.

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**HealthEquity**

**Nick Carel**

ncarel@healthequity.com | (434) 242-9610

### About HealthEquity | [www.healthequity.com](http://www.healthequity.com)

HealthEquity is a leading administrator of Health Savings Accounts (HSAs) and other consumer-directed benefits. In partnership with employers, benefit advisors, health plans, and retirement providers, they advance their mission, empowering more than 12 million members to connect health and wealth.



# BUILDING CULTURE BY INTENTION AMID REMOTE & HYBRID WORKFORCE MODEL SHIFTS

JUAN LUIS BETANCOURT, HUMANTELLIGENCE

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. A framework for using psychometrics to build culture intentionally.
- 2. How to leverage technology to measure, manage, and hire for culture fit.
- 3. Actionable recommendations you can begin to implement immediately.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Missy Allen**  
mallen@paylocity.com | (757) 409-5076

**About Paylocity| [www.paylocity.com](http://www.paylocity.com)**  
Paylocity is a national company with local support. It is rapidly becoming the most modern workforce management solution, with time, HRIS, payroll, and all the tools to build a culture of engaged employees in one. From hire to retire with open architecture we customize solutions to your business needs and goals.

# HR MUST INFLUENCE THE STRATEGY, NOT JUST IMPLEMENT IT

TIM O'ROURKE, PEARL MEYER & PARTNERS LLC

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Identify what is strategic rather than tactical.
- 2. Get information from the data you collect.
- 3. Ask probing questions about where the bank is going next.

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**Pearl Meyer**

**Tim O'Rourke**

tim.orourke@pearlmeyster.com | (919) 732-2716

### About Pearl Meyer | [www.pearlmeyster.com](http://www.pearlmeyster.com)

Pearl Meyer is the leading advisor to boards and senior management on the alignment of executive compensation with business and leadership strategy, making pay programs a powerful catalyst for value creation. Their industry experts focused exclusively on the banking sector have helped hundreds of financial institutions achieve their objectives.

# STAY AHEAD OF THE DIGITAL DEMAND

GREG VARNELL, Q2

## YOUR NOTES:

## KEY TAKEAWAYS/ACTION ITEMS:

1. How to think a bit differently about digital transformation.
2. How to innovate quickly in a new model.
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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?



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**Dave Waller**  
dave.waller@q2.com | (512) 633-0388

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Q2 is a financial experience company dedicated to providing digital banking and lending solutions to banks, credit unions, alternative finance, and fintech companies in the U.S. and internationally. With comprehensive end-to-end solution sets, Q2 enables its partners to provide cohesive, secure, data-driven experiences to every account holder – from consumer to small business and corporate.

# FIVE FASTER PAYMENTS: UPDATES FROM A COMMUNITY BANK INSIDER

DJ SEETERLIN, CHESAPEAKE BANK

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

1. After attending this session, attendees will be able to define your strategy for implementing faster payments rails like RTP, and FedNow.
2. Prepare your teams for some of the most common fraud attacks happening with newer payment methods.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Darren Smith**

darren@atmusa.com | (919) 534-3232

### About ATM USA | [www.atmusa.com](http://www.atmusa.com)

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# ELEVATING YOUR FRAUD PREVENTION STRATEGIES\*

RYAN DUTTON, SHAZAM

*\*THIS SESSION **WILL NOT** BE RECORDED AND SESSION MATERIALS **WILL NOT** BE SHARED*

## YOUR NOTES:

### KEY TAKEAWAYS/ACTION ITEMS:

- 1. The latest trends in industry related fraud.
- 2. Effective tools for managing the impact of payment card fraud.

### HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

### WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?



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**Gary Woods**

[gwoods@tblnetworks.com](mailto:gwoods@tblnetworks.com) | (804) 822-3652

#### About TBL Networks | [www.theblinkylight.com](http://www.theblinkylight.com)

TBL Networks provides advanced technology solutions with a focus on collaboration, enterprise networking, cyber security, data center, disaster recovery, and data insights - all available as subscription services. Located in Richmond, TBL Networks understands the Virginia banking community, their needs, how business evolves, and the audit process.

# STRATEGIC RISK TAKING

LENN FREEMAN, GENESYS

## YOUR NOTES:

## KEY TAKEAWAYS/ACTION ITEMS:

## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**David Saylor**

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### About Genesys Technology Group | [www.genesystg.com](http://www.genesystg.com)

Founded in 2007, Genesys Technology Group is an advocate for community banks. Their mission is to help bankers understand and evaluate the shifting Fintech vendor landscape (including core vendors), maximize their debit card portfolio performance, and control existing technology expenses through effective contract and pricing negotiations.



# 2021 CYBERSECURITY OUTLOOK

BRENDAN MCGOWAN, SAFE SYSTEMS

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Attendees will have a better understanding of some emerging technologies that you will want to consider adopting into your strategy.
- 2. Attendees will have a new understanding of tools you already own and will probably want to start using them differently.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Adam Causey**  
Adam.Causey@safesystems.com | (251) 654-5533

**About Safe Systems | [www.safesystems.com](http://www.safesystems.com)**  
Safe Systems provides IT, compliance and security services exclusively for community banks and credit unions. They believe every financial institution, regardless of size, should be able to leverage the best technology to serve their community. Their services are designed to significantly decrease IT costs, increase performance, and improve compliance posture.

# OUTSIDE THE BOX: GROUNDBREAKING INNOVATIONS IN PHYSIDAL SECURITY

REBECCA CICARELLI & JEFF TRIMBLE, BRANCHSERV

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Identify new equipment solutions that may address bank/credit union challenges.
- 2. Identify new service solutions to assist the bank/credit union in optimizing resources.

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**Rebecca Cicarelli**

rcicarelli@branchserv.com | (203) 403-4226

### About BranchServ | [www.branchserv.com](http://www.branchserv.com)

BranchServ, A Division of Custom Vault Corporation, is a leader in security and automation equipment and service for banks and credit unions nationwide. Its acquisition by Convergent Technologies, the largest security integrator in the world, is pending as of this writing.

# CIVIL UNREST - CONSIDERATIONS FOR THREAT MITIGATION, SAFETY AND BUSINESS CONTINUITY\*

CHRISTOPHER GAGNE, UNITED STATES SECRET SERVICE

\*THIS SESSION **WILL NOT** BE RECORDED AND SESSION MATERIALS **WILL NOT** BE SHARED

YOUR NOTES:

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KEY TAKEAWAYS/ACTION ITEMS:

- 1. Attendees should be able to develop or add to their existing threat mitigation and security posture by adopting applicable best practices and standards articulated from the law enforcement perspective.

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HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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advanced  
network  
systems

Ed Evans

eevans@getadvanced.net | (434) 459-1668

**About Advanced Network Systems | [www.getadvanced.com](http://www.getadvanced.com)**  
Providing industry-leading cybersecurity and IT network solutions for financial institutions throughout the state of Virginia. Their offerings include a full suite of security and IT services designed to reduce the cost and risks of owning and operating your network; from individual technology projects up through the program level.



# HOW TO ILLUMINATE YOUR CYBERSECURITY BLINDSPOTS BEFORE HACKERS DO IT FOR YOU

ALEX HEID, GRADIENT

YOUR NOTES:

KEY TAKEAWAYS/ACTION ITEMS:

HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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**Gradient.**

**Chris Warman**

cwarmanjr@gradientcyber.com | (412) 600-7860

**About Gradient | [www.gradientcyber.com](https://www.gradientcyber.com)**

Gradient is a total solution that is a powerful combination of proprietary technology and Senior Cybersecurity Analysts that make the job of managing security much easier for small teams. As your cybersecurity partner, Gradient's cybersecurity analysts extend and support your cybersecurity team. Gradient's Security Intelligence Platform provides insights into your cybersecurity maturity and improvement with their native out-of-the-box compliance features that are built on industry-leading cybersecurity frameworks.



# 2021 AND RE-ENERGIZED BANK EXAMINATION: WHAT TO EXPECT

TIM NAUGHTON, STRATEGIC RISK ASSOCIATES

YOUR NOTES:

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KEY TAKEAWAYS/ACTION ITEMS:

- 1. An increased awareness of the greater intensity of upcoming examinations, and the ways in which that intensity will surface helping you conduct a more effective self-examination process.
- 2. Expand the range of materials scrutinized. You'll look harder at your service to small businesses, including not just credit approval and denial, but pricing, collection management, loan modification, extent of collateral requirements and other covenants and you'll compare your responses to customer complaints, to assure that severity of the result did not fall in a pattern disfavoring protected classes.
- 3. The use of artificial intelligence will be considered for its immediate effect on regulatory compliance, as well as for the degree to which current enterprise risk assessment measures will assure future uses of AI are measured and understood.

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HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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# ALCO AND BALANCE SHEET MANAGEMENT IN THE ERA OF COVID-19

AL FORESTER, EMPYREAN SOLUTIONS

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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The VBA has partnered with RISC Associates to provide a Certified Regulatory Vendor Program Manager (CRVPM) training program to our member banks. The (CRVPM) course provides bankers with the regulatory knowledge, methodology and best practices to build and manage a compliant third-party oversight program that meets FFIEC Guidance and GLBA 501(b) requirements. Contact Walt Lyons ([wlyons@vabankers.org](mailto:wlyons@vabankers.org) or 804-819-4746) to learn more!

# UNDERSTANDING SOC AUDIT REPORTS

BRYAN NEWLIN, YHB

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Identify the four different SOC reporting options.
- 2. Quickly and efficiently identify areas in a SOC report that might raise a concern about your service provider.
- 3. Generate value in your SOC review process by understanding the terminology and using CUECs to improve your bank’s internal controls.

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**Bryan Newlin**

bryan.newlin@YHBCpa.com | 540-662-3417

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# MANAGING CLIMATE CHANGE RISK WITHIN THE ERM PROGRAM

MIKE COHN, WOLF PAC SOLUTIONS GROUP

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

1. After attending this session attendees will know how to complete the initial assessment of threats, risk, and controls for a climate risk management program.
2. Have knowledge on initial regulatory expectations.
3. Have a reading of the 'Tea Leaves' on emerging expectations surrounding climate risk management programs.

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**Kelsey Henry**

khenry@wolfandco.com | (617) 419-4276

### About WolfPAC Integrated Risk Management | [wolfandco.com](https://www.wolfandco.com)

WolfPAC Integrated Risk Management is a secure, web-based Enterprise Risk Management solution that automates the identification of risks, threats, and control gaps. Developed by financial and risk management professionals, WolfPAC® provides tools to review and monitor information technology, data security and privacy, third-party, business continuity, regulatory compliance, and other enterprise-wide risk assessments. WolfPAC serves as a foundational element of your risk management program and maximizes the outcome of strategic objectives.

# LEGAL UPDATE

DEMARION JOHNSTON, VIRGINIA BANKERS ASSOCIATION

YOUR NOTES:

KEY TAKEAWAYS/ACTION ITEMS:

HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?



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Powered by the Senior Housing Crime Prevention Foundation

Shea Gabrielleschi

shea@shcpfoundation.org | (901) 529-4773

**About CRA Partners | [www.shcpfoundation.com/cra-partners](http://www.shcpfoundation.com/cra-partners)**  
CRA Partners helps your bank protect local seniors against the growing problem of elder financial abuse. They pair your bank with low-income nursing homes in your footprint. Through a CRA-qualified donation to our foundation, residents of a local nursing home receive the protection of our Senior Crimestoppers program at no cost.

# FAIR LENDING HOT SPOTS

STEVE HOUCHENS, CRCM & MARGARET DOLINGER, CRCM, TCA

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

1. After attending this session, attendees will be able to assess and potentially enhance your fair lending program;
2. Initiate discussion within your institution around Diversity, Equity, and Inclusion and how the bank can move forward under this initiative;
3. Have direction in the development of a special purpose credit program.

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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**Brenda Payne**

b\_payne@tcaregs.com | (252) 573-8008

### About TCA | [www.tcaregs.com](http://www.tcaregs.com)

As former bankers they see compliance from your perspective. They understand your day-to-day challenges and know how to collaborate with your team to lighten your regulatory and operational burdens. You can rely on TCA to deliver a practical compliance strategy that is on target and tailored to your needs. TCA--A Better Way!



# BANKING CANNABIS CUSTOMERS

MIKE BRESNICK & ANDREW BIGART, VENABLE LLP

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Understand the legal framework for providing banking services to Cannabis-related businesses.
- 2. Engage in discussions with bank management on the key considerations for providing banking services to cannabis-related businesses .
- 3. Understand the steps needed to set up a robust compliance program to provide banking services to Cannabis-related businesses.

## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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# LONG AND WINDING ROAD: LIBOR'S TRANSITION

ELIZABETH MADLEM, COMPLIANCE ALLIANCE

## YOUR NOTES:

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## KEY TAKEAWAYS/ACTION ITEMS:

- 1. Understand the contractual, reputational and legal risks associated with this transition of LIBOR.
- 2. Review best practices and potential benchmarks for successfully preparing and implementing this transition.

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## HOW DOES WHAT YOU LEARNED APPLY TO YOUR GOAL(S)?

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## WHAT/WITH WHOM DO YOU NEED TO SHARE WHAT YOU LEARNED (I.E. TEAM, SUPERVISOR, ETC.)?

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# INDIVIDUAL ACTION PLANNING SHEET



Now that you have attended the VBA Pathways to Connect & Protect 2021 virtual sessions, please take some time individually and as a team to reflect on everything you have learned. On the Individual Action Planning sheet, reflect on your personal takeaways from the sessions and how you want to take action on that information. Organize a meeting with your teammates who attended the sessions and use the Team Action Planning sheet to reflect on your takeaways that align with your organization's strategic priorities. What action will you as a team or as an organization take based on this information?

**My top takeaways from the sessions I attended during VBA Pathways to Connect and Protect are:**

**One thing I want to do as a result of this new information:**

**Three steps I can take to make this one change:**

**Who I will share this information with at my bank:**

# TEAM ACTION PLANNING SHEET



Ideas/initiatives that we want to implement as a team:

Who will need to be involved in this implementation?

What are our next steps?

What is our timeline for this implementation?

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