

# 2025

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# IBA PROFESSIONAL DEVELOPMENT CATALOG



8425 Woodfield Crossing Blvd, Suite 155E  
Indianapolis, IN 46240  
317-387-9380



# Professional Development

## **2025 PROGRAMMING OVERVIEW**

The Indiana Bankers Association provides a full range of professional development and educational opportunities for all levels within the bank—from tellers and branch managers to senior managers, c-level executives and directors. Topics range from operations, technology, lending and compliance to marketing, finance, retail, human resources and more.

As times continue to change, so does the method of IBA program delivery. Sessions are offered via online courses and webinars, as well as via in-person at the IBA Education Center or at offsite venues. In addition to the array of webinars, seminars, conferences, and special events that the IBA offers each year, members can also benefit from customized in-bank programming and one-on-one professional development consultation to aid in individual and team development.

# Program Delivery

**Webinars** are live, internet-based programs that address timely banking topics to a broad audience. Several Employees may participate without leaving the bank. Archived programs are available for convenient access after the original airing.

**Hybrid sessions** are facilitated by an in-person instructor but allow participants to decide whether they would prefer to participate in-person at the IBA Center for Professional Development or if they would prefer to participate remotely right along with those who choose to attend in person.

**In-person sessions** take place at the IBA Center for Professional Development in Indianapolis. Participants have the opportunity to gather in a traditional classroom setting for sessions led by experienced experts, learning with other professionals on similar career paths.

**Virtual sessions** are educational seminars or schools that are only provided virtually. The speaker will be giving these classes live so participants will still be able to ask questions and interact with the instructor. Materials and connection links will be provided 2-3 days in advance of the class.



# Scholarships

## Graduate School of Banking Scholarship

This scholarship is funded by the Prochnow Educational Foundation and awarded through the Indiana Bankers Association. The scholarship pays \$1,500 (approx. one-third) of the annual tuition for each of three GSB resident sessions, for a total value of \$4,500.

Scholarship winner is chosen by the Indiana Bankers Association and selection is based on involvement in banking, the Association and the community. Applicant must be entering their freshman year at GSB. For further details, contact [Laurie Rees](#) at 317-387-9380.

## Graduate School of Banking - Human Resource Director Scholarship

This scholarship is funded by the Prochnow Educational Foundation and awarded through the Indiana Bankers Association. The scholarship pays \$700 toward tuition for the one-week Human Resource Management School. Scholarship winner is chosen by the Indiana Bankers Association and selection is based on involvement in banking, the Association and the community. For further details, contact [Laurie Rees](#) at 317-387-9380.

## FLD 2 LDP Scholarship

The [FLD 2 LDP Scholarship](#) allows for one FLD member to receive \$1,500 toward the registration fees for the IBA Leadership Development Program. This scholarship is made possible thanks to the sponsorship of Amundsen Davis LLC. For questions or more information, contact [Josh Myers](#) at 317-333-7165.

## Annual IBA Washington Trip Scholarship

This scholarship is for a participant of the IBA Leadership Development Program to attend the succeeding year's IBA Annual Washington Trip. This scholarship is made possible thanks to the sponsorship of Amundsen Davis LLC. For questions or more information, contact [Josh Myers](#) at 317-333-7165.



# Executive Level Programs

## **MEGA Conference - May 27-29, 2025**

Established in 1992, the Mega Conference has evolved into one of the premier gatherings among state bankers' associations nationwide. As our flagship educational event, it features dynamic keynote speakers, over 48 engaging concurrent sessions, a lively exhibit hall, and a variety of optional social activities.

## **Annual Washington Trip - September 29-October 1, 2025**

The IBA Annual Washington Trip affords bankers the opportunity to talk with legislators and regulators about the successes and concerns of Indiana's banking industry. These officials need to hear your ideas firsthand in order to produce workable laws and regulations. This is your chance to tell policymakers face-to-face why the regulatory burden imposed on banks is too heavy and to make suggestions for modifications to burdensome rules. Bankers who have attended past Washington Visits were able to solve problems and raise issues of concern to policymakers individually. The trip is planned for maximum contact and productivity.

## **Annual Convention - September 7-9, 2025**

The Convention serves as the annual meeting of the Association and combines education with social and networking events to bring together members in a relaxed atmosphere.

## **Legislative Briefing and Reception**

Each year, the Indiana Bankers Association Legislative Reception offers bankers the opportunity to meet with legislators during the legislative session to discuss issues that are important to the banking industry. This is a valuable way for the legislators of Indiana to see the individuals who make up the banking industry. The event begins with a legislative briefing where bankers are informed of the current legislation being discussed at the statehouse. Then, a legislative reception follows, where Indiana's elected officials are invited to meet with bankers in a casual environment.

## **Regional Meetings**

The IBA schedules regional meetings each summer to allow bankers and legislators the opportunity to meet for lunch and get to know one another. The regional meetings include an hour-long update on the Indiana Bankers Association, including legislative information and advocacy opportunities. Following the update, local legislators from the Indiana General Assembly arrive to meet and have lunch with bankers from the community.



# Executive Level Programs

## **Economic Outlook Luncheon - December 12, 2025**

The Economic Outlook Luncheon showcases economic experts who will share valuable information about both current events and the future of the region's economy. It also provides business leaders an opportunity to network with peers.

CEOs, presidents, CFOs, directors and other members of senior management would benefit from this program. Additionally, IBA members are encouraged to invite small business customers, who would benefit from the high-level networking and a look at the year ahead.

## **CFO Forum**

**Group 1: February 13, 2025; June 5, 2025; November 13, 2025**

**Group 2: February 14, 2025; June 6, 2025; November 14, 2025**

These CFO Forums provide an investment for you and your bank's future by offering a platform and opportunity for noncompeting CFOs and controllers to exchange ideas freely, dissect problems, and discuss important issues with peers. Groups are organized based on bank size and market to ensure that participants have as much in common as possible.

## **CEO Peer Groups**

Meeting twice per year, CEO Peer Groups give bank leaders an opportunity to meet with CEOs from similarly sized institutions to discuss ongoing industry challenges. Each peer group is structured so that participants are non-competitors.

## **Risk Management Officer Forum - March 6, 2025; July 31, 2025; November 20, 2025**

The Risk Management Forum provides a platform and opportunity for Chief Risk Officers and other risk managers to exchange ideas freely, discuss important issues, and explore potential solutions with peers. Chief Risk Officers and other senior risk and compliance managers are the target audience for this forum. CEOs and CFOs of banks that do not have an established risk department would also benefit from the forum.

## **Call Report Update - March 25, 2025**

In an ever-changing regulatory and accounting environment, it is important that call report preparers and reviewers remain up to date. Attend this seminar for a detailed discussion of each call report schedule as well as the real-life challenges of completing an accurate call report. To help explain the requirements, detailed examples are provided, and there will be an opportunity to ask questions specific to your situation.



# Executive Level Programs

## Call Report Preparation - August 12-13, 2025

In an ever-changing regulatory and accounting environment, it is important that call report preparers and reviewers remain up to date. Attend this seminar for a detailed discussion of each call report schedule as well as the real-life challenges of completing an accurate call report. To help explain the requirements, detailed examples are provided, and there will be an opportunity to ask questions specific to your situation.



# Bank Directors Programs

## **MEGA Conference - May 27-29, 2025**

Established in 1992, the Mega Conference has evolved into one of the premier gatherings among state bankers' associations nationwide. As our flagship educational event, it features dynamic keynote speakers, over 48 engaging concurrent sessions, a lively exhibit hall, and a variety of optional social activities.

## **Annual Convention - September 7-9, 2025**

The Convention serves as the annual meeting of the Association and combines education with social and networking events to bring together members in a relaxed atmosphere.

## **FDIC Directors College 2026**

This program will be offered by the IBA and is ideal for executives and board members alike. Watch for agenda details.

## **The Directors Education Series** -- virtual training provided by OnCourse Learning

This library of courses focuses on the role and expectations of the Bank Director's conduct, duties, and liabilities. These programs have been authored by a group of highly recognized, respected industry experts. A subscription to the series assists with the responsibility to educate those who sever on the Board. One annual subscription provides a financial institution access to the entire course library with a new course published each month.

## **Economic Outlook Luncheon - December 5, 2025**

The Economic Outlook Luncheon showcases economic experts who will share valuable information about both current events and the future of the region's economy. It also provides business leaders an opportunity to network with peers.

CEOs, presidents, CFOs, directors and other members of senior management would benefit from this program. Additionally, IBA members are encouraged to invite small business customers, who would benefit from the high-level networking and a look at the year ahead.





# Management and Leadership Programs

## Leadership Development Program

**March 10-12, 2025; May 5-7, 2025; August 18-20, 2025; October 27-29, 2025**

A world-class faculty teamed with the Indiana Bankers Association to tailor a program that will have an immediate, positive impact on attendees and the banks that sponsor them. This series of four sessions, spaced over an eight-month period, is intense and demanding. It is designed for future bank leaders who are motivated and eager to reach full potential. An ambition to excel is a requisite for this series, as is the desire to face and learn from challenges. At the conclusion of the eight-month program, the participant will be poised to contribute significantly to the bank's future, as well as contribute positively to the bank's work environment by building and maintaining influential relationships with employees and supervisors.

## Emerging Leaders

**June 17, 2025; July 15, 2025; August 12, 2025; September 16, 2025; October 7, 2025; November 25, 2025**

The Emerging Leaders Digital Program is designed for key staff in the bank who are emerging as potential leaders. It is designed to deliver essential management skills from accomplished leaders that will enable the emerging leader to more rapidly develop. Participants will engage in video conference calls covering specific management topics once a month for 6 months. Participants will gain experience with management/leadership competencies without ever being out-of-office. At the conclusion of the program, participants will have leadership plans in place preparing them to take the next leadership steps at their banks.

## FLD Day at the Statehouse - March 5, 2025

The FLD Day at the Statehouse is dedicated to giving a voice to emerging bank leaders in the political process. It is a prime opportunity to get to know legislators and learn firsthand about the IBA's grassroots advocacy efforts. Though IBA is active politically through lobbying and PAC support, IBA's most effective advocacy takes place at the grassroots level, when bankers meet face-to-face with lawmakers to express industry views.

## FLD Leadership Conference - July 9-10, 2025

This dynamic event features industry leaders, interactive sessions and networking opportunities designed to foster meaningful connections and inspire innovation.



# Management and Leadership Programs

## **Graduate School of Banking - University of Wisconsin - Madison - July 27-Aug. 8, 2025**

Today, GSB is widely recognized as the nation's leading and most progressive banking school, offering a comprehensive course of study that focuses on meeting the changing needs of today's bank manager. GSB is the only graduate banking school in the nation that relies on its alumni, Banker Advisory Board and Academic Committee to create a unparalleled learning and networking experience. GSB is sponsored and governed by the Central States Conference of Bankers Associations in partnership with the University of Wisconsin-Madison and has been the school of choice for more than 23,000 bankers, with good reason.

## **Graduate School of Banking Financial Managers School - September 22-26, 2025**

Designed by experienced CFOs, this school goes beyond the basic to present tools and best practices for community bank financial managers to build a solid foundation in asset/liability management. Understand how profitably manage a financial institution's balance sheet, develop effective strategies and communicate strategies to the board and senior management that ensure effective decision-making.

## **Banking on Women Conference - October 22-23, 2025**

This conference, where women take the lead, encourages professional development and leadership in your bank, while also promoting the importance of fostering relationships and inspiring women to reach their career goals and aspirations. Our powerhouse speakers will help you advance your decision-making and negotiating processes and teach you how to deliver and apply these insights to benefit your future and your financial institution's future.

The event will benefit all levels of staff from any financial institution or financial services provider interested in the enhancement and career growth of women in Indiana. This conference will give you the opportunity to network with other professional women and discuss similar challenges and solutions.

## **Supervisor Boot Camp - July 29-30, 2025**

Whether you are new or seasoned managers and supervisors, attendees find this experiential training invigorating, motivating and applicable to managing and supervising others. You will learn how to manage crucial conversations and challenging situations. You will practice a coaching approach that encourages your staff to be engaged and accountable and walk away with a toolbox for immediate use back in your workplace!



# Management and Leadership Programs

## [Understanding Bank Performance](#) - April 23-25, 2025

The Indiana Bankers Association is pleased to partner with the Washington Bankers Association, as well as state associations from across the country, to provide this new virtual series. The program will focus on providing students with the information, access to instructors and networking with peers to help prepare them for new responsibilities within the bank. Each program is carefully crafted to ensure students have personal interaction with expert instructors and includes homework designed to help them fully understand class materials.

## [Retail Management Series](#)

January 15, 2025; April 5, 2025; August 12, 2025; November 12, 2025

Retail Management Series is a four-part, interactive, learning series designed to provide a complete overview of management and leadership principles for Retail Managers serving in all roles of the retail banking line of business for the bank.

## [Professional Development/Education/Trainer Forum](#)

March 7, 2025; July 18, 2025; November 21, 2025

The forum offers a structured and professional platform that thrives on participant engagement, expert knowledge, and the systematic sharing of insights, resulting in a dynamic environment for learning and networking within the industry. The forum operates on a triannual basis and offers participants a platform that fosters dialogue and ensures that pertinent topics submitted by the participants themselves are thoroughly addressed. The forum extends its commitment to knowledge enhancement by offering supplemental reference materials. These documents are thoughtfully curated to complement discussions, further enriching the depth of insights.



# Finance

## CFO Forum

**Group 1: February 13, 2025; June 5, 2025; November 13, 2025**

**Group 2: February 14, 2025; June 6, 2025; November 14, 2025**

These CFO Forums provide an investment for you and your bank's future by offering a platform and opportunity for noncompeting CFOs and controllers to exchange ideas freely, dissect problems, and discuss important issues with peers. Groups are organized based on bank size and market to ensure that participants have as much in common as possible.

## Treasury Management Forum

**April 22, 2025; August 19, 2025; December 2, 2025**

The Treasury Management Forum will provide an investment for you and your bank's future by offering a platform and opportunity for Treasury Management Officers, and other team members who sell, support, or market TM products and services to business customers, to exchange ideas freely, dissect problems, and discuss important issues with your Treasury Management peers. Group size is limited so be sure to get registered today!

## Graduate School of Banking Financial Managers School - **September 22-26, 2025**

Designed by experienced CFOs, this school goes beyond the basic to present tools and best practices for community bank financial managers to build a solid foundation in asset/liability management. Understand how profitably manage a financial institution's balance sheet, develop effective strategies and communicate strategies to the board and senior management that ensure effective decision-making.

## Call Report Update - **March 25, 2025**

This one-day seminar focuses on equipping community banks with the fundamental knowledge necessary for completing an accurate and efficient Call Report. The presentation will guide call report preparers through the practical application of the complicated instructions and provide clarity to common reporting challenges. Participants will gain a deeper understanding of how the balance sheet schedules support and affect risk-weighted assets and regulatory capital calculations.

## Call Report Preparation - **Fall 2025**

In an ever-changing regulatory and accounting environment, it is important that call report preparers and reviewers remain up to date. Attend this seminar for a detailed discussion of each call report schedule as well as the real-life challenges of completing an accurate call report. To help explain the requirements, detailed examples are provided, and there will be an opportunity to ask questions specific to your situation.



# Human Resources and Education/Training

## **Human Resources Director Forum - April 24, 2025; August 21, 2025; November 4, 2025**

This Human Resources Director Forum will provide a platform and opportunity for Human Resources Directors to exchange ideas freely, dissect problems, network, and discuss important issues with peers. The Human Resources Director Forum will meet three times annually at the Indiana Bankers Association headquarters with your facilitator for this forum, Terry Saber. The agenda for each session will flow based on feedback from participants in the forum group. As necessary, subject matter experts will be brought in to cover specific issues and topics based on responses from the forum members.

## **Train the Trainer Workshop - September 24-25, 2025**

This two-day hands-on Train-the-Trainer workshop provides the knowledge and skills needed for your training team to create, deliver, facilitate, evaluate and manage successful training sessions for your bank employees. During the first day, participants will learn the basics of training, and facilitation as well as essential skills for working with adult learners. The second day participants will learn how to create engaging participant-centered content, turn boring content into interactive learning, create evaluations to improve training and much more.

## **Professional Development/Education/Trainer Forum**

**March 7, 2025; July 18, 2025; Nov. 21, 2025**

The forum offers a structured and professional platform that thrives on participant engagement, expert knowledge, and the systematic sharing of insights, resulting in a dynamic environment for learning and networking within the industry. The forum operates on a triannual basis and offers participants a platform that fosters dialogue and ensures that pertinent topics submitted by the participants themselves are thoroughly addressed. The forum extends its commitment to knowledge enhancement by offering supplemental reference materials. These documents are thoughtfully curated to complement discussions, further enriching the depth of insights.

## **Bank Trainers Conference and Expo - October 7-9, 2025 - Orlando, Florida**

Hear from top training and HR speakers, leaving you inspired and ready to conquer new challenges. Unlock new professional opportunities, gain expertise from actionable breakout sessions, and learn how to implement them immediately. Join a community of passionate HR and training professionals in financial services. Immerse yourself in top-notch education, community-building, entertainment, and surprises on-site.

## **Graduate School of Banking Human Resource Management School**

**April 28 - May 2, 2025**

Keep pace with the rapidly changing landscape of HR, with an in-depth study of HR issues as well as a working knowledge of the business of banking. Topics include an introduction to the bank profitability analysis, A/L management and more- plus in-depth study of critical HR issues like building and maintaining company culture, benefits and rewards, talent management, compensation, employment law and more.

# Lending

## Senior Lender Forum

**Group 1: February 5, 2025; June 11, 2025; October 15, 2025**

**Group 2: February 6, 2025; June 12, 2025; October 16, 2025**

IBA will organize the forum based on bank size and market to ensure that participants have as much in common as possible. The group will be small - usually no more than 20 participants. The Forum will meet three times during the year. Eight to ten topics will be discussed at each session; participants are strongly encouraged to suggest agenda topics of interest. Forum participants get the benefit of working with expert consultants on a cost-saving basis. Comprehensive handout compiled and provided to each group member, along with a binder for retention of handouts, notes and references.

## Midwest Agricultural Banking School - December 1 - 4, 2025

The Midwest Agricultural Banking School is designed to provide you with the practical aspects of agricultural credit & finance, farm management, marketing & related subjects. The development and implementation of this curriculum has involved literally hundreds of bankers and has resulted in a nationwide system of quality banker education. This school is designed to further enhance the education of bankers in the field of agricultural finance.

## Commercial Lending School - June 2-6, 2025

The purpose of the IBA Commercial Lending School is to prepare mid-level bankers and commercial loan officers to serve effectively and profitably by developing an understanding of your bank's risk appetite, risk tolerance, risk culture and the risks assumed in the loan portfolio. The faculty of this school are top-notch banking veterans who will give you plenty of opportunity to ask questions, share concerns and learn from the best. You will receive an information-packed manual. Each module contains learning concepts and resource materials. You will return to your bank as a valuable asset with a comprehensive and practical overview of banking. The school prepares you to tackle complex commercial lending situations and helps you boost your banking career.

## Mortgage Lending School - September 16-18, 2025

This three-day mini-institute provides the real-estate lending professional with a solid foundation for managing and producing a quality mortgage portfolio. This hands-on institute includes exercises in buying and selling mortgages in the secondary markets, a visit to a construction site, and analysis of the tax return of a self-employed borrower. The institute's objective is to assist the participants in three areas: improved customer service, more efficient processing and servicing and stronger underwriting. All of these should result in increased earnings from the mortgage portfolio. The "new" underwriting findings are also discussed.



# Lending

## **Consumer Lending School - August 19-20, 2025**

This two-day seminar follows the consumer lending process from taking the application to making the final credit decision. Using cases and providing suggested practices, participants will learn how to better navigate what can be a tricky process. Because consumer lending tends to be one of the most automated and regimented lending functions in banking, special emphasis will be placed on recognizing exceptions to established lending policies and practices, and how to properly mitigate these risks - when it makes sense for bankers to intervene and grant a waiver.

## **Financial Statement Analysis & Business Cash Flow Analysis - February 11-12, 2025**

Want to learn how to analyze business financial statements and tax returns in a compact, intense, case-based two-day virtual session? Want to move beyond ratio analysis and into the operating, investing and financing cash flows of a business and how they affect loan repayment? This workshop is your answer, whether you are new to lending and financial analysis, or even if you have been away from financial analysis for a while and need a refresher.

## **Breaking into Banking 101: Fundamentals of Commercial Banking - February 26, 2025 (Virtual)**

Commercial banking can be intimidating because of its complexity and the risk oriented nature of the work. This course is a clear and thorough introduction to the key concepts, terminology, and processes involved in credit and lending. It doesn't assume much prior knowledge of the topic, so it's ideal for those in their first year in the industry. Learners will walk away with a clear understanding of their job and how their specific role fits into the bank's overall profitability goals. New credit analysts, lenders, and underwriters, as well as bankers who don't do credit analysis but need a working knowledge of the process. This may include statement spreaders, loan processors and closers, treasury management associates, administrative support for credit or lending officers, branch managers, and interns.

## **Advanced Credit Analyst School - February 13-14, 2025**

This two-day course provides lenders and analysts with important tools beyond basic business financial ratios and credit analysis. First, it expands the conventional ratio analysis into cash flow analysis. Second, the non-financial issues faced by the business (industry, market and management risk) are discussed in relation to the ratios and cash flow results. Third, we introduce advanced tools that bring all of these concepts together: sustainable growth rate and break-even analysis. These tools lay the groundwork for developing assumptions to be used with computerized projection models. Finally, we discuss how to bring these issues into your written analysis of the credit.



# Lending

## [Analyzing Repayment Services](#) - **March 26, 2025 (Virtual)**

This 9-module online course is a “sequel” to the 101 course and is best taken after completion of that course, though it is not a prerequisite. The 201 course includes a case study and dives deeper into topics covered in modules 4, 6, and 8 of the 101 course: analyzing a borrower’s balance sheet, income statement, collateral, and risk ratings. This course is most appropriate for credit analysts, lenders, portfolio managers, and others who need skills in financial statement analysis and writing credit

## [Loan Operations Manager Forum](#) - **March 5, 2025; July 17, 2025; December 11, 2025**

The Forums provide an opportunity for community bank loan operations professionals to exchange ideas freely, dissect problems and discuss important issues with their peers. For most banks, the investment in technology to support the lending function continues to expand and become more complex. The Loan Operations Manager Forums are designed to help deal with the technical side, as well as to be a rewarding experience where members can grow professionally and personally.

## [Ag Clinic](#) - **December 4, 2025**

For more than 50 years the IBA Ag Clinic has served as one of the largest agricultural banking conferences in the country. Sponsored in cooperation with the Department of Agricultural Economics at Purdue University, the Clinic provides a wide range of general and concurrent sessions addressing the most current issues facing agricultural lenders. The clinic also provides an excellent opportunity for attendees to interact with more than 250 senior lenders and agricultural leaders from throughout the region.

## [Advanced Commercial Lending School](#) - **December 9-10, 2025**

This advanced, two-day course will focus on effective initial structuring and subsequent monitoring of commercial lending relationships. It goes beyond the basics of financial analysis and portfolio management to provide experienced bankers the advanced tools to influence credit quality and profitability. We explore critical quantitative factors such as the role of sales growth in the financial performance of the borrower, as well as qualitative issues of industry, market and management risks. Participants will learn how to improve their handling of a loan portfolio such that credit quality can be maintained along with producing new revenues for the bank.





# Retail

## Retail Banking Management Series

**January 15, 2025; April 5, 2025; August 12, 2025; Nov. 12, 2025**

Retail Management Series is a four-part, interactive, learning series designed to provide a complete overview of management and leadership principles for Retail Managers serving in all roles of the retail banking line of business for the bank.

## Essentials of Banking

**Jan. 23, 2025; Feb. 20, 2025; March 20, 2025; April 24, 2025; May 22, 2025; June 26, 2025**

In association with Performance Solutions, Inc., Drexler Consulting, LLC is excited to again present one of our legacy programs, the Essentials of Banking, new and improved for 2025. Essentials of Banking is a Six-part, interactive, virtual learning series designed to provide a complete overview of banking principles and operations. Each session is 3 hours in length. Who should attend? New bank employees in all roles/departments and bank directors new to banking, management trainees, and bank veterans who are looking to broaden their banking knowledge.

## Graduate School of Banking Digital Banking School - **March 3, 2025 (Virtual)**

The demand for digital banking services has grown exponentially. That's why GSB offers its popular Digital Banking School to help the community banks understand how to grow and thrive in the digital banking space. With eight in-depth classes held twice weekly for a month, this program brings in content experts from every banking function- technology, compliance, human resources, risk management, marketing and more- offering 25 hours of relevant content.

## IRA Basics - **February 19, 2025**

Join us for the IRA Basics course for a full-circle overview of IRAs and the associated rules. This course is perfect for those new to IRAs, and a helpful refresher and update for those needing to "unlearn" some old rules because of the many recent changes. IRA Basics is part of a 2-day series, with day one covering the basics and day two covering advanced issues. During day one, we'll provide you with a solid foundation of the basic IRA rules, both old (if still applicable) and new.

## Advanced IRA Issues - **February 20, 2025**

The second of two IRA offerings, this session will get into the nitty gritty of the new distribution regulations, exploring—in depth—how these new rules affect both IRA owners and IRA beneficiaries. After thoroughly dissecting the new rules and their impact on IRA owners and beneficiaries, we'll discuss concrete steps your financial organization can take to help ensure ongoing compliance, while also providing top-notch customer service.



# Retail

## **Senior Retail Banking Forum - January 16, 2025; May 15, 2025; September 11, 2025**

This Senior Retail Banking Forum will provide a platform and opportunity for Retail Banking Officers to exchange ideas freely, examine pressing issues in today's ever-evolving regulatory, cost-consciousness and productivity-driven environment. This program where individuals who are responsible for retail banking issues in their institutions have the opportunity to discuss and explore collaborative solutions to challenges they face on a day-to-day basis. The agenda for each session will flow based on feedback from participants in the forum group. As necessary, subject matter experts will be brought in to cover specific issues and topics based on responses from the forum members.

## **General Banking School (co-sponsored with the Kentucky Bankers Association)**

**June 2-5, 2025**

The Kentucky Bankers Association's (KBA) General Banking School is designed for employees who possess a current knowledge of banking that sufficiently prepares them for this advanced paced curriculum. The mission of this school is to teach bankers to understand the business of managing a bank company, the financial decisions that must be made, how each bank department is inter-related and the economic environment of the business of banking. The KBA General Banking School will prepare bankers for any of the national graduate schools of banking.

## **Outside Calling School - February 6 & 13, 2025**

The 2-lesson Outside Calling School will deliver the most up-to-date selling techniques to help you and your company deliver loan and deposit results. You will go through the selling process to identify how to gain the trust of your client, gain a larger share of wallet, and sell what your client truly needs. We will also address how to effectively manage the pricing discussion, how to overcome objections, and how research and profiling the client/prospect will improve targeting, prospecting and presentations.



# Marketing

## [Marketing Directors Forum](#) - February 25, 2025; June 24, 2025; October 28, 2025

The Marketing Directors Officer Forum will provide a platform and opportunity to exchange ideas freely and examine pressing issues in today's ever-evolving regulatory, cost-conscious and productivity-driven environment.

## [Marketing AI Bootcamp 2.0](#) - June 23, 2025

This seminar explores the role of AI in shaping the future of marketing within financial institutions. Attendees learn about strategic applications of AI that can optimize their marketing functions and drive meaningful customer engagement. The discussion also addresses common apprehensions related to AI, such as job security, and how AI, rather than replacing marketers, can amplify their capabilities and make them more valuable within their organizations. You are not only equipped with an understanding of AI's transformative potential but also provided practical steps to leverage AI in enhancing marketing strategies, safeguarding data privacy, building proficient teams, and preparing for the future. By focusing on empowerment, we turn AI from a potential threat into a valuable tool for augmenting your capabilities, driving forward your strategies, and making a greater impact within your organization.

## [Graduate School of Banking Strategic Marketing Offerings](#) (Details TBA)

GSB's innovative marketing programs integrate critical marketing and business development strategies with the business of banking- covering key topics like marketing, planning branding, content and digital marketing, customer acquisitions, customer experience, data management, goals setting and more, all in the context of business of banking. Watch for updates on future programs and complete the interest form at [GSB.org](http://GSB.org) to be notified about marketing programs.



# Compliance

## **Community Bankers for Compliance Series (Available In-Person and Virtual)**

**February 11, 2025; May 13, 2025; August 5, 2025; November 18, 2025**

Indiana Bankers Association (IBA) is pleased to sponsor the annual Community Bankers for Compliance Program (CBC). The CBC Program is the most successful and longest running compliance training program in the country. The CBC Program will provide your bank with up-to-date information on the ever-changing bank regulations, as well as guidance for structuring and maintaining your in-bank compliance program. In addition, it provides a forum where those responsible for regulatory compliance can discuss issues and exchange ideas with other community bankers.

Most community banks do not have the time or money to build elaborate compliance systems, but there is a solution. The CBC Program will provide practical, user-friendly compliance techniques and explain how they can be related to all areas of compliance. For example, setting up compliance files, developing training programs, responding to the examinations, and resolving disputes are among the areas that are reviewed.

## **Compliance Officer Forum - January 28, 2025; May 20, 2025; October 7, 2025**

The IBA Compliance Forum provides a platform and opportunity for Compliance Officers, Internal Auditors and other risk managers to exchange ideas freely, discuss important issues, and explore potential solutions with peers. Compliance Officers, compliance managers, risk professionals and auditors tasked with testing compliance requirements are the target audience for this forum. Business line management would also benefit from the forum.

## **Opening New Accounts Documentation and Compliance - March 13, 2025**

Managing risk is the #1 priority for all financial institutions, starting at the new account desk. If a criminal cannot open a bank account, they cannot negotiate a stolen check, embezzle from their employer, or steal from your organization and community. Well-trained new account personnel and universal bankers who recognize and stop attempted fraudulent activity are the first lines of defense in protecting a financial institution from fraudsters. Trust and business accounts continue to grow in popularity and complexity - LLCs owned by Revocable Trusts and businesses owned by other businesses... the need for ongoing compliance training is paramount to maintain diligence and update processes and procedures. The session answers many of the complicated questions customers and employees ask. The 200+ page detailed manual, included in the registration and customized to Indiana State law, has become an invaluable resource for banks across the state.



# Compliance

## **Internal Audit School - December 9-10, 2025**

The Indiana Bankers Association is pleased to announce that Crowe, LLP will present this timely, two-day program for the IBA membership. Crowe, LLP provides innovative business solutions in the areas of assurance, benefit plan services, financial advisory, forensic services, performance services, risk consulting, and tax consulting.

This program is formatted to provide detailed guidance over current regulatory hot topics such as vendor risk management, model risk management, interest rate risk and liquidity risk including internal audit techniques. It will also cover more traditional audit concepts such as lending and communicating effective audit results but include recent trends in those areas. The final portion of the program will cover bank audit committee responsibilities.

## **CBC Schools - October 2026**

**Deposit / Operations Compliance School - Virtual Training - October 8-10, 2025**

**Lending Compliance School - Virtual Training - October 15-16, 2025**

**Regulation Z University - Virtual Training - October 29-30, 2025**

Join Indiana Bankers Association and Young & Associates, Inc. for the 2025 Community Bankers for Compliance Schools. Each 2-day school, will lay the cornerstone for community bankers to build and manage an in-bank compliance program.

These three compliance schools are often attended by individuals from multiple departments in the bank. Banks can register one individual or multiple people (from customer service, lending or operations) to the school most suited for their responsibilities at the bank. While especially beneficial for compliance officers looking for an overview (or refresher) regarding these regulations, this program has proven beneficial to those who have general oversight or must audit the compliance function of the bank. Regardless of the responsibility within the organization, attendees will learn the ins and outs of the covered regulations.



## **BSA Graduate School - February 4-6, 2025 (Virtual)**

This two-day program is designed for BSA professionals who are competent in the core requirements of Bank Secrecy Act rules. It will provide an advanced level of training and interactive discussion on the challenges of developing and managing an effective BSA program. The course heavily relies on roundtable discussions and case studies. The facilitator will steer discussions based on predetermined topics and attendee requests. Each attendee is encouraged to contribute at least one discussion topic, and attendees will be solicited for topics prior to the school. The presenters will select additional topics based on interactions with clients, as well.

## **BSA/AML School: Establishing a Strong Framework for Compliance**

**March 4-5, 2025 (Virtual)**

The financial industry is required to take an increased leading role in the prevention of money laundering and potential terrorist funding. In addition, compliance with the Bank Secrecy Act (BSA) continues to be a top priority with the regulators. One major requirement of BSA is to ensure that the BSA Officer and the BSA Team are well trained and qualified to carry out the duties of this critical position. The BSA/AML Fundamentals School provides the framework for understanding the BSA team's roles and responsibilities for BSA/AML and OFAC compliance.

## **Advanced BSA/AML CFT Financial Crime Compliance Conference - August 26-27, 2025**

To meet the ongoing regulatory requirements, Indiana Bankers Association is pleased to offer the Advanced BSA/AML Compliance Program. This two-day program focuses on the latest changing BSA arena and offers tips and tools to develop and manage an "adequate" and "an effective and reasonably designed" BSA program. Attendees will receive a Training Program Manual, an updated FFIEC BSA/CFT Examination Manual, a Resource Manual (packed with examples, forms, templates, handouts), and opportunities to network with peers on current challenges and trends.

## **BSA Officer Forum**

**Group 1: January 22, 2025; May 7, 2025; October 1, 2025**

**Group 2: January 23, 2025; May 8, 2025; October 2, 2025**

This BSA Officer Forum will provide a platform and opportunity to exchange ideas freely and examine pressing issues in today's ever-evolving regulatory, cost-conscious and productivity-driven environment. Peer-to-peer sessions have proven very successful for other IBA membership focus groups. The Topics for each session will flow based on feedback from participants in the forum group. As necessary, subject matter experts will be brought in to cover specific issues and topics based on responses from forum members.



# Security, Technology and Operations

## **Security Officers Forum - January 28, 2025; May 20, 2025; September 30, 2025**

This Forum is designed for those who are responsible for physical security at their bank. The IBA Bank Security Officer Forum provides a platform and opportunity for management level personnel and staff to exchange ideas freely, compare practices, discuss concerns they face on a day-to-day basis, and discuss important strategic and operational issues with peers.

While much of the discussion will be based on what the members of the Forum want to cover, here are just some of the topics that we've heard are on the radar screens of today's bank security professionals.

## **Fraud Forum - March 18, 2025; July 22, 2025; November 19, 2025**

This forum will allow for mediated peer discussion of fraud-related topics. Topics are largely determined by participants and may include the following: Check processing protection and wire fraud counterfeit checks/financial crimes Card skimming Elder fraud Scams High risk businesses Bitcoin crimes Money laundering.

## **Information/Cybersecurity Officer/IT Officer/Operations Officer Forum**

**Group 1: February 26, 2025; June 25, 2025; October 29, 2025**

**Group 2: February 27, 2025; June 26, 2025; October 30, 2025**

This Information/Cybersecurity Officer/IT Officer/Operations Officer Forum will be organized based on bank size and market to ensure that participants have as much in common as possible. The group will be small - usually no more than 20 participants. Eight to ten topics will be discussed at each session; participants are strongly encouraged to suggest agenda topics of interest.

## **Graduate School of Banking Digital Banking School - March 3, 2025 (Virtual)**

The demand for digital banking services has grown exponentially. That's why GSB offers its popular Digital Banking School to help the community banks understand how to grow and thrive in the digital banking space. With eight in-depth classes held twice weekly for a month, this program brings in content experts from every banking function- technology, compliance, human resources, risk management, marketing and more- offering 25 hours of relevant content. A single, per-bank registration allows anyone in the organization to participate, allowing key decision-makers to join for one, or all, of the learning sessions for maximum organizational impact.



# Security, Technology and Operations

## **Cyber, Fraud and Physical Security Conference - April 16-17, 2025**

The combination of private sector experts and law enforcement personnel participating in the 2025 Conference will provide you with a unique opportunity to enhance cyber, fraud and physical security practices, foster collaboration, and exchange knowledge on effective strategies. Whether you're interested in innovative technology solutions, community outreach programs for your bank or policy development, this conference promises valuable insights and networking connections. Don't miss out!

## **Graduate School of Banking Bank Technology Management School - April 7-11, 2025**

It's vital that senior managers and IT professionals understand how to effectively deploy and use technology to meet business goals and regulatory requirements. This school will focus on integrating the business of banking with the key IT management topics- AI project management, vendor management, leveraging infrastructure, IT incident response planning, risk assessment and more.

## **Fraud Academy - August 12-14, 2025**

Fraud Academy is a pioneering initiative designed to arm bankers with the skills needed to detect and combat fraud. Our unique program features insights from experts across the DEA, FBI, law enforcement, AARP, and the financial industry, offering a robust education in fraud prevention from those who know it best. With fraud costing every bank valuable time and money, our curriculum targets over eighteen types of fraud, including check fraud, elder fraud, cybercrimes, and introduces effective prevention tools. Equipping bankers with the knowledge to minimize fraud-related losses and protect your institution's bottom line.

## **Graduate School of Banking Bank Cybersecurity School - October 13-17, 2025**

This school will give you practical insights to mitigate the risk of fraud. Cyber-criminals are growing increasingly sophisticated in their ability to gain access to sensitive data. An in-depth interactive study of the latest IT security best practices, including information security law, IT security management, virtualization, infrastructure, network penetration testing, ethical web hacking, AI and mobile defense round out the IT security curriculum. We will also cover the business of banking for important industry context.





# General Banking

## **Call Report Update - March 25, 2025**

This one-day seminar focuses on equipping community banks with the fundamental knowledge necessary for completing an accurate and efficient Call Report. The presentation will guide call report preparers through the practical application of the complicated instructions and provide clarity to common reporting challenges. Participants will gain a deeper understanding of how the balance sheet schedules support and affect risk-weighted assets and regulatory capital calculations.

## **Banking Fundamentals - ABA online - March 31, 2025**

This course includes three 4-week courses that combine the principles of the banking industry with real-world application. Ideal for new bankers, or bankers seeking to gain an understanding of the changing world of financial services. It is an online, paperless series of courses that combines peer collaboration with instructor guidance. Course includes: The Banking Industry, Bank Lines of Business, and Building Customer Relationships.

## **General Banking School (co-sponsored with the Kentucky Bankers Association)**

**June 2-5, 2025**

The Kentucky Bankers Association's (KBA) General Banking School is designed for employees who possess a current knowledge of banking that sufficiently prepares them for this advanced paced curriculum. The mission of this school is to teach bankers to understand the business of managing a bank company, the financial decisions that must be made, how each bank department is inter-related and the economic environment of the business of banking. The KBA General Banking School will prepare bankers for any of the national graduate schools of banking.

## **Essentials of Banking**

**Provided twice a year (January through June & July through December)**

Essentials of Banking is a Six-part, interactive, virtual learning series designed to provide a complete overview of banking principles and operations. Each session is 3 hours in length. This is a training for new bank employees in all roles/departments and bank directors new to banking, management trainees, and bank veterans who are looking to broaden their banking knowledge.

Session I: January 23, 2025 - Overview of Banking

Session II: February 20, 2025 - Banking History, Regulations, and Risk Management

Session III: March 20, 2025 - Banking Products and Services

Session IV: April 24, 2025 - How Banks Make Money and Risk Management

Session V: May 22, 2025 - Banking Compliance Overview

Session VI: June 26, 2025 - WOW! Service and Growing the Bank



# Frontline

## **Virtual Certified Teller Program - March 4, 2025**

Frontline Excellence (previously referred to as Essential Teller Issues), is a program that covers 5 pivotal modules for today's frontline professionals. This program serves as an important reminder about the significance of their role, serving as the CEOs of the customer experience and reinforcing the importance of their actions and reactions as a reputation builder for your brand.

This program is information rich. Attendees leave with a renewed dedication to achieve excellence in their roles. Each attendee will leave with a comprehensive training manual, acting as a valuable workplace reference. Esteemed as the nation's most dynamic teller training experience, this presents a unique opportunity to elevate your entire front-line team toward an exceptional level of performance.

## **Outside Calling School - February 6 & February 13, 2025**

The 2-lesson Outside Calling School will deliver the most up-to-date selling techniques to help you and your company deliver loan and deposit results. You will go through the selling process to identify how to gain the trust of your client, gain a larger share of wallet, and sell what your client truly needs. We will also address how to effectively manage the pricing discussion, how to overcome objections, and how research and profiling the client/prospect will improve targeting, prospecting and presentations.

## **Frontline Branch Series - January 29; February 26; March 19; April 23, 2025**

With constant change facing financial institutions, transactions falling and overall visits declining, we must find ways to engage our clients, new clients and the community. We must find ways to deliver better client service in a more efficient manner.

Frontline Branch Series is a four-part, comprehensive series for beginning and new frontline professionals that focuses on creating a client-friendly environment on a budget. This series will focus on how we deliver the ultimate client experience, streamlining work processes to make things fun for employees and the client, resulting in the optimal institution of the future. The series includes group discussion and problem solving, fresh ideas throughout the presentation and a case study.



# Wealth and Trust Management

## **Midwest Trust and Wealth Management Conference - Ann Arbor, MI - October 8-10, 2025**

The annual Midwest Trust and Wealth Management Conference is a must for wealth management and trust professionals throughout Michigan and our neighboring states. Featuring top-notch speakers and materials, continuing education credit (CTFA, CFP, CPE) and valuable networking opportunities, the event is a do-not-miss event.

This conference is beneficial for:

- Trust department, trust company and private bank executives
- Senior trust officers, administrators and wealth advisors
- Business development officers and future leaders
- Financial and estate planners



# Conferences

## **Mega Conference - May 27-29, 2025**

Established in 1992, the Mega Conference has evolved into one of the premier gatherings among state bankers' associations nationwide. As our flagship educational event, it features dynamic keynote speakers, over 48 engaging concurrent sessions, a lively exhibit hall, and a variety of optional social activities.

## **Annual Convention - August 7-9, 2025**

The convention serves as the annual meeting of the Association and combines education with social and networking events to bring together members in a relaxed atmosphere. All events for the IBA Annual Convention will be held at the French Lick Resort in French Lick, Indiana.

## **Banking on Women Conference - October 22-23, 2025**

This conference, where women take the lead, encourages professional development and leadership in your bank, while also promoting the importance of fostering relationships and inspiring women to reach their career goals and aspirations. Our powerhouse speakers will help you advance your decision-making and negotiating processes and teach you how to deliver and apply these insights to benefit your future and your financial institution's future.

The event will benefit all levels of staff from any financial institution or financial services provider interested in the enhancement and career growth of women in Indiana. This conference will give you the opportunity to network with other professional women and discuss similar challenges and solutions.

## **Cyber, Fraud and Physical Security Conference - April 16-17, 2025**

The combination of private sector experts and law enforcement personnel participating in the 2025 Conference will provide you with a unique opportunity to enhance cyber, fraud, and physical security practices, foster collaboration, and exchange knowledge on effective strategies. Whatever you're interested in innovative technologies solutions, community outreach programs for your bank or policy development, this conference promises valuable insights and networking connections. Don't miss out!

## **FLD Leadership Conference - July 9-10, 2025**

This dynamic event features industry leaders, interactive sessions and networking opportunities designed to foster meaningful connections and inspire innovation.



# Conferences

## **Ag Clinic - December 4, 2025**

For more than 50 years the IBA Ag Clinic has served as one of the largest agricultural banking conferences in the country. Sponsored in cooperation with the Department of Agricultural Economics at Purdue University, the Clinic provides a wide range of general and concurrent sessions addressing the most current issues facing agricultural lenders. The clinic also provides an excellent opportunity for attendees to interact with more than 250 senior lenders and agricultural leaders from throughout the region.

Continuing the practice started in 2005, several sessions have been specifically designed to be of interest to farmers and borrowers. Agricultural lenders are strongly encouraged to invite their clients to join them for this enjoyable and educational event. This is an outstanding opportunity to add value to your client relationship. A special fee is available for IBA members who wish to bring a guest(s).

## **Advanced Agricultural Banking Conference - September 10-11, 2025**

The advanced Ag Banking Conference is designed to provide the lending community with updates on current agricultural topics that can help you better serve your farmer customers. Reserve your place today and invest in your future as a leader in agricultural lending.

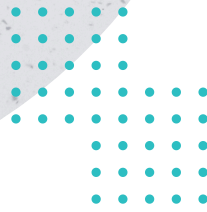
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# ONLINE TRAINING PARTNERS



To minimize the need for travel and to provide educational opportunities to better suit the busy working schedules and lives of banking professionals, IBA incorporates online learning. Programs are offered through multiple partnerships.

## ONCOURSE LEARNING



Total Training Solutions (TTS), a faction of OnCourse Learning, offers some 250 industry-specific webinar topics that are available live or on-demand. With TTS OnCourse Learning, banks can train multiple employees for one fee with nationally recognized trainers, and subscription packages are available.

Visit [indiana.bank/training\\_partners](http://indiana.bank/training_partners) to see a complete list of offerings provided by each of IBA's training partners.

## COMMUNITY BANKERS WEBINARS

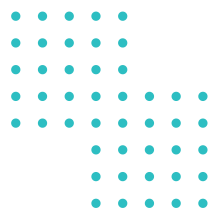


The nation's leading webinar network exclusively for community bankers. We've been providing relevant, reliable, and cost-effective bank webinars and bank training for over 40 years. Community Bankers Webinar Network provides webinars for bankers on compliance, lending, regulations, security, operations, new accounts, collections, fraud, security and other topics.

## GRADUATE SCHOOL OF BANKING



Since 1945, the Graduate School of Banking at the University of Wisconsin has been educating professionals and creating leaders in the banking industry. Look to the Graduate School of Banking for exceptional leadership and growth opportunities available for professionals across all areas of financial services. Opportunities include in-person classroom courses and convenient online seminars.



# Continuing Education

## Continuing Professional Education (CPE)

The IBA is recognized as a public accountant continuing education sponsor by the Indiana Department of Financial and Professional Regulation through December 31, 2025.



American  
Bankers  
Association®

## ABA Professional Certifications

ABA promotes industry excellence and continuous career development for bankers through a wide range of job-specific professional certifications. Developed by experts in the financial services industry, their certifications are acknowledged industry-wide as the symbol of excellence in banking skills and knowledge.

ABA Professional Certifications are awarded only to those financial services professionals who pass a rigorous examination and maintain their level of knowledge with ongoing education. Certificates improve individual performance and provide nationally recognized credentials for career development.

Obtain a nationally recognized designation in areas including wealth management and trust, compliance, risk management, and bank marketing.

### Areas of Certification:

- Certified AML and Fraud Professional (CAFP)
- Certified Enterprise Risk Professional (CERP)
- Certified Financial Marketing Professional (CFMP)
- Certified IRA Services Professional (CISP)
- Certified Regulatory Compliance Manager (CRCM)
- Certified Trust Financial Advisor (CTFA)



# Continuing Education



## **Independent Community Bankers of America**

ICBA Education offers eleven certification programs. The certification programs are nationally recognized, professional designations and require the user to follow specific processes and procedures before a certification is granted.

Certification programs are offered through ICBA Education's Institutes. The following certification programs are currently offered:

- Auditing – Certified Community Bank Internal Auditor (CCBIA)
- Bank Security – Certified Community Bank Security Officer (CCBIA)
- BSA/AML – Certified BSA/AML Professional (CBAP)
- Commercial Lending – Certified Commercial Lending Officer (CCLO)
- Compliance – Certified Community Bank Compliance Officer (CCBCO)
- Consumer Lending – Certified Community Bank Consumer Lender (CCBCL)
- Credit Analysis – Certified Community Bank Credit Analyst (CCBCA)
- Data Analytics – Certified Community Bank Data Analyst (CCBDA)
- Information Technology – Certified Community Bank Technology Officer (CCBTO)
- Enterprise Risk Management – Certified Community Bank Risk Specialist (CCBRS)
- Marketing – Certified Community Bank Marketing Strategist (CCBMS)



## **Secure Banking Solutions (SBS)**

SBS certifications will prepare students and their financial institutions for cybersecurity threats and regulations and create confidence with examiners and auditors. Each course is available online and is tailored to specific roles within an institution, creating a flexible and targeted learning experience.

- Business Continuity Professional
- Cybersecurity Manager
- Ethical Hacker
- Forensic Investigator
- Incident Handler
- Mobile Administrator
- Security Executive
- Security Manager
- Security Technology Professional
- Vendor Manager
- Vulnerability Assessor



# IBA Team

The IBA's expert team is available to provide more information on the full range of opportunities available to bankers. Please visit the IBA website at [www.indiana.bank](http://www.indiana.bank) or reach out to the team for answers to your questions.



**Laurie A. Rees**  
Vice President -  
Education and Training  
LRees@indiana.bank



**Christina M. Bennett, CMP**  
Vice President -  
Meetings and Events  
CBennett@indiana.bank



**Elizabeth DeHaven**  
Education Manager  
EDeHaven@indiana.bank



**Our Aspiration**  
*The Indiana Bankers Association strives to grow stronger banks and stronger communities.*



## **Our Values**

- In fulfilling our mission, we will:*
- maintain the highest ethics, integrity and respect for others;
  - serve with professionalism, innovation and resourcefulness;
  - instill passion, positive attitude and enthusiasm; and
  - remain mindful that the success of the IBA is judged by the success of its members.