

GOALS

STRATEGIES 2018-2020

### Tell the Story



Indiana banks play an integral role in the wellbeing of the communities they serve. The IBA will “tell the story” of banking through traditional and social media to raise public awareness of banks’ good deeds.

#### Increase public awareness of banks’ community service

- Create awards to showcase exemplary bankers – notable bank leaders and outstanding community service
- Implement IBA Community Commitment Campaign to share bank community service videos through social media

#### Increase engagement of member banks with the IBA

- Establish network of bank communicators, and supplement contact with social media connections
- Increase news release submissions to the IBA from member banks via toolkit and webpage to expedite submissions

#### Leverage banks’ story for talent recruiting

- Distribute targeted messages through social media regarding banks’ building of communities to pique interest in banking as a career
- Create videos of positive work experiences, featuring members of the IBA Future Leadership Division and participants of the Leadership Development Program

### Fiscal Strength



To manage financial resources, the IBA will enhance the financial strength of the Association through efficiency, transparency, establishment of clear fiscal policies, and exploration of new streams of revenue.

#### Establish policies to ensure sustained fiscal strength

- Reach consensus on financial policies and procedures, with consideration of the New Markets Tax Credit residual
- Prudently maximize return on the investment portfolio through comprehensive reviews, soliciting of requests for proposals, and following recommendations as appropriate

#### Increase and diversify revenue streams

- Optimize income in the areas of dues, education, and products and services
- Explore proprietary opportunities by conducting targeted feasibility studies

#### Steward IBA expenses well

- Carefully manage IBA personnel and overhead expenses to assure the highest effectiveness and best value
- Manage programming profitability in education and training – schools, seminars, webinars, conferences, conventions, etc. – while continuing to deliver first-class member service

### Education



Providing best-in-class educational resources is a core Association strength. The IBA will engage in new delivery channels and leverage technology to meet members’ diverse educational needs.

#### Investigate new education delivery channels/approaches

- Assess innovative delivery channels/ approaches, such as burst segments, live streaming, podcasts/YouTube, etc.
- Identify the technology needed to implement new delivery options
- Create Google Groups, based on current IBA discussion group categories

#### Enhance current offerings

- Re-implement the IBA Economic Summit
- Optimize IBA’s macro schedule to maximize educational offerings
- More tightly target promotion of educational offerings to specific bank segments

#### Engage large IBA-member banks more effectively

- Develop a strategy tailored to large banks (\$1 billion+ in assets), seeking win-win opportunities
- Continue semi-annual engagement sessions with CEOs of large banks
- Implement large-bank roundtable meetings with HR/training directors to address educational needs

### Government Relations



Advocacy is central to IBA’s service offerings. The IBA will strengthen bankers’ collective voice by increasing member support of Indiana BANKPAC and by enhancing grassroots lobbying outreach.

#### Grow Indiana BANKPAC

- Grow peer-to-peer fundraising by establishing PAC ambassador program
- Increase individual contributions through enhanced BANKPAC materials and peer-to-peer exchange
- Increase membership awareness and recognition of importance of PAC engagement through innovative approaches to fundraising
- Enhance GR intentionality in communication by updating/creating videos, infographics, talking points and other marketing tools

#### Increase member engagement and effectiveness in grassroots

- Engage younger bankers with goal of increasing their voice in political arena
- Leverage IBA communication tools by equipping grassroots contacts with effective advocacy materials
- Establish key contact program strengthening current industry relationships with lawmakers
- Increase linkage of members to legislators by creating new opportunities and avenues

### Next-Gen Bankers



Talented professionals are the heartbeat of success. The IBA will engage with the next generation to invite the best and brightest into the industry, and to retain top banking talent in Indiana.

#### Attract talent to banking in Indiana

- Develop an internship program for Indiana banks, aligned with in-state university centers
- Explore development of a banking major in Indiana through university outreach

#### Assist member banks in retaining and developing talent

- Create collaborations between the IBA Future Leadership Division and the Leadership Development Program
- Offer a leadership-specific education track

#### Grow future Indiana bank leaders

- Build the IBA Future Leadership Division by strengthening its value proposition, expanding opportunities for involvement, and broadening FLD advocacy
- Increase reach of the Leadership Development Program by assessing crossover LDP/FLD opportunities and by addressing leadership-development needs of large banks