# Advisory Committee Meeting Minutes

PROGRAM COMMITT	EE NAME: Business Technology Banking P	rofessionals	
CHAIRPERSON:	Rashmi Pillai		
MEETING DATE:	5/4/2021 <b>MEETING TIME</b> : 2 – 3 PM	MEETING PLACE:	WARE 207
RECORDER:	Rashmi Pillai	PREVIOUS MEETING:	11/30/2018
		EE MEMBERS	
NAME	List all members of the committee, then pla	ice an X in the box left of name of EMPLOYER INFO	those present PHONE EMAIL
Amy Henderson	Vice President/Branch Manager, Commercial Loans	Amarillo National Bank	Amy.Henderson@ANB.COM
Christa Gutierrez	AVP, People Development Leader	Amarillo National Bank	Amy.Henderson@ANB.COM
Denise Thomas	Vice President, Personnel	Amarillo National Bank	Christa.Gutierrez@ANB.com
Terri Boswell-Willian	ns Senior Vice President, Branch Administration	Amarillo National Bank	Denise.Thomas@ANB.COM
Bowden Jones	Chief Consumer Officer & Executive Vice Presiden	t FirstBank Southwest	bowdenjones@fbsw.com
Kevin Kuehler	Senior Vice President & Retail Banking Manager	FirstBank Southwest	KevinKuehler@fbsw.com
Samantha Morris	Assistant Vice President & Training Coordinator	FirstBank Southwest	samanthamorris@fbsw.com
Edythe Carter	Dean, Stem Division	Amarillo College	elcarter@actx.edu
Toni Gray	Executive Director, Workforce Development	Amarillo College	tbgray@actx.edu
Lynne Kenney	Instructor, CIS	Amarillo College	Ikenney@actx.edu
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	EX-OFFIC	IO MEMBERS	
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## **Advisory Committee Meeting Minutes**

An email was sent out in April of 2021 inviting bank employees from FirstBank Southwest and Amarillo National Bank to the meeting about our proposal to put forth a certificate for Banking and Finance. The meeting was set up to get industry input when creating the banking certificate. Few of the attendees had attended our meeting held back in November of 2018.

Handouts: WECM course listing complete with course description and learning outcomes. The handout included the 5 courses that we believed would be ideal for the certificate and part of the meeting discussion

An agenda was set to keep the meeting to an hour as promised. The items on the agenda were presented in the following order

#### Introductions –

- Edie Carter welcomed the group and expressed her support with this venture.
- During introductions, some of the attendees talked about being part of the first meeting we had about a proposed certificate in Banking and Finance in 2018.

### Proposed Certificate

- Was presented by Rashmi Pillai. Points presented:
- the certificate was presented as one that students could complete in 1 semester
- we asked the attendees to review the handout and let us know what classes they would like us to include. The proposed 5 classes were there as a
  jumping point
- We also wanted to see if they had an input on the learning materials that we should use for the classes with ABA (American Bankers Association) as a
  potential source
- Expressed a desire to get instructors from the industry to be part of our certificate
- Presented our target population for the certificate high school students, individuals changing careers and ones on a career break (stay at home parents)
- o Asked for an input on the job eligibility of student/candidate criteria and background check
- Conversion of the certificate to an academic certificate
- Salient points from the discussion
  - The attendees were positively unanimous in their response to the duration of the proposed certificate.
  - The attendees reviewed the handout. We spent more than 15 minutes figuring out what would be the best courses to include
    - Samantha Morris expressed that she would like to see a course where they learn proper keyboarding, especially the number keypad
    - She also expressed that she would like to see a class that has students comfortable with technology
    - Other attendees agreed with her while giving us instances of why that would be helpful.
    - Terri Boswell-Williams talked about including customer service, office skills, email etiquette, social media appropriatenesss and confidentiality
    - Customer service was heavily stressed throughout the meeting.
    - Bowden Jones talked about including personal financial responsibility in the Financial Literacy class.
    - All attendees actively participated in helping us figure out the 5 classes that we should focus on for the meeting
  - With regards to learning materials, they talked about looking into it more before the next meeting
  - About target population, they asked us to include older individuals who have retired and are looking at pursuing a second career (part time or full time)

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- Regarding the background check that they are required to complete, the attendees were unanimous in letting us know that the focus is on checking if
  they have any financial fraud in their records. They told us that they would confirm the same with their hiring department (HR)
- The proposal to convert the certificate to an academic certificate was met with very positive responses.
- Adams Earn & Learn Program
  - o Presented by Toni Gray
  - She pitched the new program started at AC to get students in a job (part time or full time) while coming to school to enhance their knowledge and skills in their chosen field
  - o Toni asked the attendees if we could get a buy in/commitment to look into this program
  - o Toni presented the timeline for our first cohort and the process to whet prospective candidates and set them up for interviews with potential employers
  - Points from the discussion
    - Attendees were definitely open to the possibility and let us know that they would need to take this back to their workplace to discuss is further
    - Attendees from both banks, FirstBank Southwest and Amarillo National Bank shared contact information with Toni to further discuss the program.
- The meeting was adjourned with the promise to meet within the month to finalize the courses and present outlines for the classes, marketing plans etc

Rashmi Pillai

Program Coordinator, Business Technology

X Rashmi Pillai