

Advisory Committee Meeting Minutes

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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)
 - 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 appropriateness 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
 - 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
 - Toni asked the attendees if we could get a buy in/commitment to look into this program
 - 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

X Rashmi Pillai

Rashmi Pillai
Program Coordinator, Business Technology