

2019 | 2020

# YEAR IN REVIEW

**IT** isn't often you can say, without a shadow of a doubt, this year has been like no other in modern memory. The WBA's fiscal year runs from June 1 until May 31 and traditionally, we've reflected on how WBA and its subsidiaries have served you the entire year. But this is not like any other year. COVID-19 has changed how you serve your customers. You have the same dedication to fantastic service, but now it's delivered a little differently. It's the same for WBA.

That's why this *Year in Review* edition is separated into before and during COVID-19. Like you, we've stepped up to the challenge of adapting services, products, and delivery in a world that continues to change daily. This doesn't negate the value we delivered early in the year, but it does highlight how we've pivoted to meet your quickly changing needs.



Rose Oswald Poels  
WBA President and CEO

**BANKS** make a difference in their communities  
by providing financial resources and expertise, every day.

**WBA** does the same for you, your bank,  
and all Wisconsin bankers, every day.

**YOU** make a difference to your customers  
by providing value and service, every day.

Our mission statement says it all:

*“We promote a healthy environment for banks in Wisconsin through actively **advocating, educating, and supporting** our members.”*

The companies of WBA, Inc. ▲ Working together for you.





Meeting with Wisconsin Senate Majority Leader Scott Fitzgerald at WBA's Capitol Day.



WBA Residential Mortgage Lending School attendees. More than 30 bankers attended the school.



Wisconsin Bankers Foundation scholarship recipient Coy Bowe and his mother Carrie, Citizens State Bank of Cadott.

# YEAR IN REVIEW – BEFORE COVID-19

## Advocating

**26** Pro-banking Wisconsin laws passed with potentially 6 more due to Senate Action in Extraordinary or Special Session.

**11** Anti-banking Wisconsin laws stopped.

**118** Advocacy Officers representing Wisconsin's banking industry.

**1,970** State bills actively tracked.

**575** Media mentions.

**6,414** Monthly Facebook impressions.

**1,194** Twitter engagements.

**45%** Increase in LinkedIn followers.

**16** Comment letters.

## Educating

**1,419** Legal Call Program questions between June 1, 2019 and March 13, 2020.

**5,400+** Attendees at WBA training events.

**660+** Educational opportunities (in-person and virtual).

**6** New, never-before-offered training programs.

**80** CEOOnly/CFOnly Network questions answered.

**100+** Best Practices Library free resources available for members.

**5,400** Books about saving provided by the Wisconsin Bankers Foundation to banks for elementary school students.

## Supporting

**149** WBA Associate Members.

**37** Different types of services offered by Associate Members.

**\$8,000** Dedicated to scholarships for high school students and bankers continuing their education.

**OVER \$1.2 MILLION** In annual savings with the WBA EBC/UnitedHealthcare Association Health Plan.

**\$134,000** Saved in April Delta Dental premiums through the WBA EBC group dental plan.

**6** New WBA forms developed by FIPCO for Wisconsin banks addressing hemp, beneficial ownership, LIBOR Addendum, and more.

**\$187,000** Saved by clients using Information Security/IT Audit, ShareFI, eforms, and eSignature services.

## MONEY-SAVING PLANS

MBIS helped multiple banks obtain broader policies at the same or lower premiums than they had been paying. One example, a multi-branch bank saved over \$30,000 in renewal premiums.

# BEFORE COVID-19



Conference Discussion of Back to Business Plan  
**Rose Oswald Poels**  
 WBA President and CEO Rose Oswald Poels testifies at an Assembly Committee on State Affairs hearing focused on the Back to Business Plan for reopening Wisconsin.



▶ **SIX FREE WEBINARS** ◀  
 (Recorded in March and April.)

Six free coronavirus-related webinars were conducted in March and April.



PPP Loan Forgiveness Guide for Borrowers and FIPCO's fillable PPP Loan Forgiveness Calculator.

# YEAR IN REVIEW – DURING COVID-19

## Advocating

- 15** Business trade associations joined our coalition for the Act 185 (AB 1038) follow-up bill and recommendation for a Wisconsin COVID Task Force.

---

- 230** Eight press releases to 230 media outlets on the banking industry's COVID response.

---

- 25+** Official communications and hundreds of emails and phone calls between WBA and lawmakers.

---

- SAVED \$250 MILLION** Saved small businesses \$250 million in taxes by proposing the elimination of the tax on the amount of the PPP forgiveness for state tax purposes.

---

- 100+** Media mentions including interviews in *Wall Street Journal*, *Bloomberg*, *Milwaukee Journal Sentinel*, *Wisconsin State Journal*, *BizTimes*, *Milwaukee Business Journal*, and more.

## Educating

- 300** Emails per day (average) on questions around the CARES Act and PPP.

---

- 27** Updates to the WBA Paycheck Protection Program FAQ.

---

- 529** Legal Call Program questions between March 14, 2020 and May 15, 2020.

---

- 20+** CEOnly/CFOnly questions answered. To keep up with the rapidly changing situation, the Peer Q&A response window was shortened from one week to one day for coronavirus-related questions.

---

- 6** Free webinars (including sessions with SBA – Wisconsin).

---

- 8** Programs re-envisioned as virtual learning opportunities.

## Supporting

- 140+** Assets on the WBA Coronavirus Resource Page ([www.wisbank.com/Coronavirus](http://www.wisbank.com/Coronavirus)).

---

- 20+** Assets for banks to use with clients ([www.wisbank.com/COVID-19](http://www.wisbank.com/COVID-19)).

---

- 11** COVID-19 related forms created by FIPCO.

---

- PPP** PPP Loan Forgiveness Calculator created by FIPCO.

---

- PPP Loan Forgiveness Guide for Borrowers.

---

- ShareFI PPP Agent services offered through FIPCO.

---

- 2,700+** Members now receiving the *Wisconsin Banker Daily*, an ePub with the latest news of the day on compliance, advocacy, and industry news.

# DURING COVID-19