

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

# 2020 2021 YEAR IN REVIEW

## President’s Message:

**AT** the onset of the pandemic, I imagined that by this time, we would be looking at the disruptions to the banking industry and to our ways of life far in the rear-view mirror. While things did not go back to the way they were as I initially expected, I am immensely proud of how our organization and its members have driven forward. The WBA’s fiscal year runs from June 1 until May 31, and this Year in Review is designed to highlight the ways WBA and its subsidiaries have served you during that time.

As we recap the engagement of our membership over the past year, I am filled with hope and confidence for the road ahead. Together, Wisconsin’s banking industry is renewing our commitment to promoting a healthy economy, being leaders in fighting inequality, and serving the needs of our communities.

Rose Oswald Poels  
WBA President and CEO

## Outgoing Chair’s Message:

**AS** my term as WBA Board Chair comes to an end, I am reflecting on the dramatic shift in our world in the past year. It has been, to say the least, a time that none of us as bankers have experienced or could ever fathom. We sent our employees home to work remotely with virtually zero notice, we closed our lobbies as the nation and world shut down to battle the pandemic, and we delivered much needed PPP loans to our

clients in times of challenge and desperation. All of this while staying committed to our mission of service to our communities.

Thank you for your unending efforts this past year and for your membership in WBA.

Paul Kohler, 2020-21 WBA Chair  
President and CEO  
Charter Bank, Eau Claire

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



2020  
2021

# YEAR IN REVIEW

## Advocating

**38** Banks earned WBA's Gold Triangle Award, our highest level of recognition for bank fundraising, apportioned by bank asset size.

**27** Banks earned the Bankers Involved in Grassroots and Government (BIGG) award, WBA's highest achievement level for bank involvement and advocacy.

**2** WBA legislative priorities signed into law since January.

**\$238,991** In contributions, FYTD, that WBA member employees, directors, and others have given to WBA's political action funds: Wisbankpac and the ABW political conduit.

**4** Legislative party candidate committees — Republican and Democrat — in the Assembly and Senate have received support from WBA political action funds.

**91%** Of the state legislative candidates WBA backed won their elections in 2020.

**70** Bills currently being tracked or monitored by WBA of the 624 bills introduced so far this session.

**37,000+** Reach of Facebook posts.

**145,000+** Reach of Twitter posts.

**151,000+** Reach of LinkedIn posts.

**27** Comment letters, 2 template letters created for membership use.

**1** Request for Agency Administrative Ruling.

**2** Regulator Panels.

**1** WDFI Trust Examiner Presentation/Joint Panel.

**1** Amicus Brief filed, Wisconsin Supreme Court.

## Supporting

**150** WBA Associate Members providing quality products and services to WBA members.\* (Read more about WBA Associate Member package holders on p. 12 of this issue.)

**2,748** Members receiving Wisconsin Banker Daily.

**OVER \$1.2 MILLION** Annual savings with WBA Employee Benefits Corporation (EBC)/UnitedHealthcare Association Health Plan.

\*See a complete list of WBA Associate Members at [www.wisbank.com/resources/associate-members](http://www.wisbank.com/resources/associate-members).

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## Educating

2,078

Legal Call Program calls, June 1, 2020–April 30, 2021.

96

CEOnly/CFOnly Network questions answered, June 1, 2020–April 30, 2021.

4

Legal Live events, with 341 banks participating and 445 bankers total.

9,000+

Attendees at WBA training events.

60  
549

Banks gave virtual or in-person presentations in K–12 classes and 549 Reading Raises Interest Kits were delivered for Teach Children To Save Day.

OVER  
255

Over 255 connections (including connections with multiple viewers) to 5 virtual FIPCO events.

900+

Educational opportunities with Education net revenues exceeding budget thanks to membership support of WBA educational programs.

4

New, free legal content creations.

7

Banconomics introduced a new partnership with UFS and expanded reports into 7 States (Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Wisconsin).

OVER  
1,050

Registrations for complimentary COVID-19 Management Series.

1

New Legal Resource Manual for Purchase.

90+

Banks successfully transitioned to new WBA EBC online benefit administration portal provided at no cost to banks.

163  
\$11,000

Applications were submitted for Wisconsin Bankers Foundation scholarships (up from 47 in 2019), and \$11,000 was awarded.

11+

New forms created by FIPCO related to COVID-19, compliance, regulatory changes, and more.

200+

Midwest Bankers Insurance Services (MBIS) helped over 200 banks with complicated insurance renewals due to COVID-19, as well as a significant increase in ransomware incidents.

5

Financial institutions adopted FIPCO ConnectFI — a new, customer-facing digital lending SaaS that integrates with *Compliance Concierge*™—with many more expressing interest.

220%

Growth in ShareFI engagement services to members, saving banks over \$185,000 and helping banks to reduce their personnel expenses.

150+  
\$12,800

Active participants bid on 33 items, raising \$12,800 in the Wisconsin Bankers Foundation's 2021 Virtual Auction.

50%

*Compliance Concierge*™ customers utilize eSignature by DocuSign, saving resources and reducing carbon and waste.

20%

Of WBA members benefited from FIPCO InfoSecurity and IT Audit engagement services.

1

New partnership between the Wisconsin Bankers Foundation and UW Whitewater to study the banking habits of college students.