

2012 LBA LEADERSHIP SCHOOL:  
“GROWING OUR NEXT GENERATION OF LEADERS”

FEBRUARY - NOVEMBER 2012

*Louisiana's banking industry is strong because of strong leadership.*

*Your next generation of leaders is right in your bank.*

*Help them get the training they need to grow and prosper.*

*Make the commitment today!*

*Sponsored By:*



LouisianaBankers

EDUCATION COUNCIL

# 2012 LBA Leadership School: “Growing our Next Generation of Leaders”

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*All instructor led sessions are held in The Bankers Center at the Louisiana Bankers Association Office at 5555 Bankers Avenue in Baton Rouge unless otherwise noted*

## February 2012

Complete online Hogan Assessments  
Complete Coaching Feedback Sessions  
Online course work on “Leadership”

## Tuesday, March 6, 2012

6:00pm-8:00pm: Opening & Welcome Session - location to be determined

## Wednesday, March 7, 2012

Morning Session 8:00am - 12:00pm: “Understanding the US Bank Monetary System” by *Willie Staats, Council for Professional Education*  
Lunch 12:00pm-12:30pm  
Afternoon Session 12:30pm - 4:30pm: “Leadership” Presentation by *SSA Consultants*

## April 2012

Online course work on “Performance Management”

## Wednesday, May 2, 2012

Morning Session 8:00am - 12:00pm: “How to Read a Bank Call Report and Key Bank Ratios” by *Jeff Fair, American Planning*  
Lunch - 12:00pm-12:30pm  
Afternoon Session 12:30pm - 4:30pm: “Performance Management” Presentation by *SSA Consultants*

## June 2012

Online course work on “Effective Teams”

## Wednesday, July 11, 2012

Morning Session 8:00am - 12:00pm: “Regulations: Deposits and Lending Overview” by *Susan Costonis, Compliance Consulting & Training for Financial Institutions*  
Lunch 12:00pm-12:30pm  
Afternoon Session 12:30pm - 4:30pm: “Effective Teams” Presentation by *SSA Consultants*

## August 2012

Online course work on “Communications”

## Wednesday, September 5, 2012

Morning Session 8:00am - 12:00pm: “Current Technology Issues” by *Lisa Traina, Lisa Traina CPA, LLC*  
Lunch 12:00pm-12:30pm  
Afternoon Session 12:30pm - 4:30pm: “Communications” Presentation by *SSA Consultants*

## Tuesday, November 6, 2012

6:00pm-8:00pm: LBEC Business Meeting & Social - Location to be determined (Leadership School students invited as LBEC’s guests)

## Wednesday, November 7, 2012

Morning Session 8:00am - 12:00pm: “Relationship Selling” by *Jay Toups, Retail Management Resources, Inc.*  
Lunch 12:00pm-12:30pm  
Afternoon Session 12:30pm - 4:30pm: “Leadership Wrap Up” Presentation by *SSA Consultants*  
Graduation Ceremony with LBA Chairman as guest speaker

## About the Program

The 2012 LBA Leadership School, “Growing Our Next Generation of Leaders”, will meet every other month throughout the year and complete online course work and assigned readings in between meetings. The course will be limited to 25 people, giving attendees the opportunity for one-on-one time with the instructors and networking with other bankers in the course. Some of LBA’s most respected instructors will conduct half day sessions on technical banking issues.

SSA Consultants will deliver individual and team development activities to the participants, including:

- Initial assessments using the Hogan Leadership Forecast Series which includes the Potential, Challenge, Values, & Coaching Reports
- Provide participants with one-on-one coaching to discuss individual results and implications to individual and team performance and career development
- Facilitate leadership development sessions leveraging the Hogan results and SSA’s 40 years of leadership development experience
- Administer iCapstone online leadership development modules that directly support the facilitated sessions and overall learning objectives of the program

### Who Should Attend

Current and future bank leaders from all areas of the bank.

## Leadership School Instructors



**Dr. William F. Staats** is a member of the faculty at the Graduate School of Banking at LSU and of several state banking schools. He is a director of the Farm Credit Bank of Texas, a \$14.2 billion institution, and vice-chairman of the Farm Credit System Audit Committee in Jersey City, New Jersey. In addition, Dr. Staats is chairman of the board of SevenOaks Capital Associates, LLC, a working-capital finance company serving the trucking industry nationwide. He is a member of the board of directors of Money Management International, a Houston-based non-profit organization providing education and consumer credit counseling from more than 120 offices across the nation, and chairman of the board of Platinum Healthcare Staffing, Inc., in Los Angeles, California. Also, he is a member of the Board of Regents of Texas Lutheran University.



**Jeff Fair** is President of American Planning Corporation, a consulting firm with over 30 years of experience serving the financial needs of community banks. American Planning specializes in outsourced short and long-term financial planning and modeling services, stock valuations, regulatory consulting, merger and acquisition guidance, de novo bank formation, capital planning, board and executive training and Subchapter-S elections. In addition to his regular financial consulting work with 40 community banks, Jeff has assisted in the formation of 26 new community banks, prepared 45 banks for S-Corporation elections, participated in 16 successful bank acquisition transactions and completed over 350 valuation engagements. Jeff holds a Masters of Finance from Louisiana State University, a Bachelor of Business Administration from Baylor University and the Accredited Valuation Analyst designation from the National Association of Certified Valuation Analysts.



**Susan Costonis** is a trainer and banking consultant. She also has an affiliation with gettechnical, inc. as an associate trainer. She specializes in compliance management along with deposit and lending regulatory training. She is a Certified Regulatory Compliance Manager and completed the ABA Graduate Compliance School. Susan also graduated from the University of Akron with a B.S in Art Education and the Graduate Banking School of the University of Colorado.



**Lisa Traina** is a nationally recognized consultant and speaker with more than 25 years experience in technology management and implementation in financial institutions, CPA firms, and a variety of small businesses. Lisa is a certified public accountant and holds a degree in computer science. Her expertise covers a wide variety of areas including internet banking, information systems auditing, technology planning, systems design, and operational efficiency consulting. She presently provides information systems and security audit and consulting services for over 75 community banks.



**Jay Toups** is the Principal of Retail Management Resources, Inc. a Lafayette based company. His 25+ years of experience includes time spent at First Commerce Corp, Hibernia National Bank, Bank One, and Dixie Savings as a Lender, Branch Manager, Regional Manager, Retail Sales Coordinator, etc. He is currently working with community banks across the Gulf South helping them grow and prosper.



**Craig Pourciau** joined SSA Consultants in 1999 after founding and leading his own human resource development training company. He holds a Masters degree in General Experimental Psychology from Southeastern Louisiana University. His areas of expertise include organizational assessment, change management, training design and delivery, diversity & multi-generational issues consulting, facilitation and executive coaching and counseling.



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**Registration Information:** (for multiple registrations, please make copies)

Name \_\_\_\_\_  
Bank \_\_\_\_\_  
Address \_\_\_\_\_  
City / State/ Zip \_\_\_\_\_  
Email Address \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Supervisor Name \_\_\_\_\_ Supervisor's Phone: \_\_\_\_\_  
Supervisor's Email Address \_\_\_\_\_

**Payment Options**

Check (Made payable to the Louisiana Bankers Association)  
 Visa  MasterCard  
Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Amount to be charged on card \_\_\_\_\_  
Name on Card (Please Print) \_\_\_\_\_  
Billing Address \_\_\_\_\_  
Signature \_\_\_\_\_

**Registration Fee**

\$2,400 member fee for all sessions  
\$3,200 non-member fee for all sessions  
February - November 2012

**\*PLEASE NOTE: Attendance in all instructor led sessions and completion of all online work is required to graduate from Leadership School**

**Cancellation Policy:**

Due to commitments we must make to secure a program, we need your help. The price of this program is inclusive of all 5 sessions. If you must cancel your registration, please do so by **February 6, 2012** to avoid a \$1400 cancellation fee. Any registrant who does not cancel will be billed the full registration fee.

**Hotel Information**

Residence Inn by Marriott - Towne Center at Cedar Lodge  
1061 Commerce Circle, Baton Rouge, LA 70809

For reservations, call (225) 925-9100 and ask for the “Louisiana Bankers Association special room rate of \$109.”

**Location**

The Bankers Center  
5555 Bankers Avenue  
Baton Rouge, Louisiana, 70808  
(225) 387-3282 (phone)

Submit registration and view roster in the Education Section of LBA's Website, [www.lba.org](http://www.lba.org).