BANKERS CONTENT

ADVOCACY DEVELOPMENT PROGRAM

American Bankers Association

Arizona Bankers Association

Arkansas Bankers Association

California Bankers Association

Colorado The Bankers Association

Connecticut Bankers Association

Oregon Bankers Association

NJBankers Making Connections

SDBankers Association

Washington Bankers Association WBA Est. 1889

Develop your voice. Build relationships. Shape banking's future.

March – August 2027

State Banking Association Members: $1,000 per registrant

Register online: www.bankerscontent.com/adp

Who Should Attend?

The Advocacy Development Program is designed for emerging leaders, branch and market managers, lenders, and other banking professionals interested in public policy and industry advocacy. Participants will develop the skills and relationships needed to engage with policy makers and support their state bankers association's advocacy efforts. *No prior advocacy experience is required*.

Held Virtually Live!

ADP is offered virtual via the online platform Zoom. Due to the interactive nature of this program, attendees should make all reasonable efforts to attend each session.

All classes will be held at:

7:00 – 9:00 a.m. HST
10:00 am - 12:00 pm PT
11:00 am - 1:00 pm MT
12:00 -2:00 pm CT
1:00 -3:00 pm ET

Program Orientation & Advocacy in Action

March 3, 2027

The Advocacy Development Program begins with an overview of what to expect and orientation for the Washington Summit. The orientation will introduce the relationship between banks, state bankers associations, and the American Bankers Association (ABA), highlighting how these organizations work together to represent the industry's interests.

Session Objectives:

- Explain the purpose of the Advocacy Development Program and expectations for participation.
- Identify the roles of state bankers associations and the ABA in representing the banking industry.
- Describe how advocacy can support a bank's customers, employees, and communities.
- Establish personal learning goals and identify opportunities to become more involved in advocacy.

ABA Washington Summit

March 8-10, 2027

Attendees of this program are strongly encouraged to attend the American Bankers Association's Washington Summit, held in Washington, D.C. *Costs to attend this program are not included in the registration*. Attendees of this program will be able to participate in a special reception at the Summit. Scholarships may be available depending on the state.

Understanding Advocacy, the Legislative Process, and the Banker's Role

May 19, 2027

Effective advocacy begins with understanding how public policy decisions are made and where bankers can influence the process. Participants will explore how legislation moves from an idea to a proposed bill, through committee hearings and legislative debate, and ultimately to enactment or defeat. The session will also examine the role of regulatory agencies and the opportunities bankers have to provide information and feedback during the policy making process. Participants will learn why lawmakers benefit from hearing directly from bankers and how firsthand experiences with customers, businesses, and communities can strengthen policy discussions.

Session Objectives:

- Define advocacy and distinguish it from lobbying and political activity.
- Describe the major steps in the state and federal legislative processes.
- Identify key decision points where bankers can influence legislation and regulatory policy.
- Identify the elected officials and legislative districts relevant to their institution.
- Recognize opportunities to build constructive relationships with policy makers throughout the year.

Understanding Banking Policy and Communicating Its Impact

June 16, 2027

Banking advocates must be able to understand complex policy proposals and explain how they affect financial institutions, customers, and communities. This session will introduce participants to the process of evaluating legislation and regulations, identifying potential consequences, and developing informed positions on public policy issues. Participants will examine current banking policy topics through presentations from state and federal advocacy professionals. Discussions will explore how policy proposals can affect bank operations, lending, compliance, consumers, and economic development.

Session Objectives:

- Identify major state and federal policy issues affecting the banking industry.
- Review a legislative or regulatory proposal and identify its primary provisions.
- Evaluate how proposed policies could affect bank operations, customers, and communities.
- Develop a concise issue briefing that communicates a policy concern and its potential consequences.
- Present an advocacy position clearly, accurately, and persuasively to a policy maker.

Building Relationships and Becoming an Effective Advocacy Champion

July 15, 2027

Successful advocacy depends on more than understanding policy. It requires the ability to communicate effectively, build trusted relationships, and encourage others to become involved. This interactive session will focus on the practical skills bankers need to engage with lawmakers and participate in grassroots advocacy efforts. Participants will explore how to establish relationships with elected officials, prepare for legislative meetings, and communicate the banking industry's perspective in ways that resonate with policy makers. Participants will learn how to connect policy issues to real-world experiences while maintaining a constructive, professional, and nonpartisan approach. Through simulated policy maker meetings and peer feedback, participants will practice introducing an issue, explaining its impact, making a specific request, and following up to maintain the relationship.

Session Objectives

- Prepare for and conduct an effective meeting with a policy maker.
- Develop clear advocacy messages supported by relevant examples and personal experiences.
- Explain how grassroots advocacy campaigns work and how bankers can participate.
- Identify opportunities to encourage colleagues and bank leadership to become more engaged in advocacy.
- Develop a plan for continued communication and relationship building after an initial policy maker meeting.

Understanding Political Action Committees and Building Sustainable Advocacy Engagement

August 18, 2027

Political engagement is an important component of a comprehensive banking advocacy strategy. This session will introduce participants to the purpose and operation of political action committees (PACs), their role in the political process, and how they complement legislative and grassroots advocacy efforts. Participants will learn about the differences between federal and state PACs, applicable legal and ethical considerations, and the factors associations consider when evaluating candidates and making political contributions. The session will also explore practical approaches to encouraging voluntary PAC participation, developing internal advocacy champions, and communicating the importance of political engagement to bank employees and leadership. Participants will discuss how political engagement fits within broader advocacy efforts and why successful programs depend on education, trust, consistent communication, and long-term relationship building.

Session Objectives:

- Explain the purpose and function of political action committees in banking advocacy.
- Distinguish between federal and state PAC structures and general compliance considerations.
- Identify considerations used when evaluating candidates and political engagement opportunities.
- Identify potential PAC champions and opportunities to increase engagement within their institution.
- Develop practical approaches for sustaining advocacy involvement beyond election cycles.

From Learning to Leadership: Your Advocacy Action Plan

September 8, 2027

The Advocacy Development Program concludes with a capstone experience designed to help participants apply the knowledge, relationships, and skills developed throughout the program. Participants will reflect on their experiences, including conversations with bank leadership, policy analysis assignments, policy maker engagement, and lessons learned from advocacy professionals and peers. Each participant will develop and present an individualized Advocacy Action Plan outlining how they intend to remain involved in banking advocacy over the next year. Plans will identify specific goals, opportunities for participation, relationships to strengthen, and practical actions that support their institution's and state association's advocacy priorities. The capstone will also provide an opportunity for participants to share successful approaches, discuss challenges, and learn from the experiences of bankers in other states.

Session Objectives:

- Summarize the key principles and skills developed throughout the program.
- Evaluate their personal advocacy strengths and areas for continued development.
- Identify opportunities for ongoing involvement with their state bankers association.
- Establish measurable goals for building policy maker relationships and participating in advocacy.
- Develop a practical, achievable plan for continued engagement.
- Communicate their advocacy goals and next steps to bank leadership.

Cost for Program

- State Banking Association Members: $1,000 per registrant

Program Advisor

Megan Managan serves as Executive Vice President/Chief Advocacy Officer for the Washington Bankers Association, where she leads legislative advocacy, government relations, and public policy initiatives on behalf of Washington's banking industry. She works closely with bank leaders, lawmakers, and industry partners to advance banking priorities and strengthen grassroots engagement. As Program Advisor for the Advocacy Development Program, Megan brings firsthand experience in legislative strategy, policy maker engagement, and developing the next generation of banker advocates.

Program Speakers

Speakers for the Advocacy Development Program will include subject matter experts from the American Bankers Association, including on specific policies, grassroots, PAC fundraising and more.

It will also feature speakers from state banking associations across the country, as subject matter experts on state specific programs and policies.

Program Format

The Advocacy Development Program will be held virtually, except for the ABA Washington Summit, in live two-hour sessions. This program is highly interactive and attendees should make all reasonable efforts to attend each session.

Register online at
www.bankerscontent.com/adp

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**Attendance at WBA programs is limited to employees, officers and directors of WBA members, non-members eligible for membership in the WBA and members of other state banking associations which grant reciprocal privileges to WBA members.*

Cancellation Policy: For all cancellations that occur up to seven days prior to the start date, a $50 cancellation fee will be charged. For cancellations with less than seven days notice, there will be no refunds. A substitute can attend at no fee. For cancelled courses and/or seminars, full fees will be refunded. Cancellation Procedure: Cancellations must be sent in writing to the WBA office via email, fax, or mail. No refunds will be granted until a written cancellation request is received by WBA.