

SOUTH CAROLINA CREDIT UNION LEAGUE

SCCUMA

South Carolina Credit Union Management Association



May 7–9, 2008 • Columbia, SC

The Power of Partnership



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Change is in the air — in more ways than one.

At the SCCUMA meeting, you'll learn how to deal effectively with organizational change, get updates on regulatory issues and the mortgage crisis, and connect with your peers.

EDUCATIONAL SESSIONS

Implementing Organizational Change

Jim Mathis

Organizational change requires thoughtful planning and implementation, combined with an unwavering commitment. You'll look at the key ingredients for successful change and learn how to avoid the common pitfalls. You'll discover an eight step model of organizational change and take home a checklist to assess your credit union's readiness.

Strategic Planning

David Reed

Yes, it's time to dust off that strategic plan! Examiners are being instructed to review strategic and business planning processes to determine if credit unions are adequately addressing this vital need. You'll gain strategies for creating effective plans.

Vendor Due Diligence and Effective Vendor Management

David Reed

Here's another NCUA hot topic! Every credit union entrusts sensitive member information to third party vendors. Learn about the regulatory requirements for vendor due diligence and know how to create an effective vendor management program.

Economic Update

Ben Rast

Get an update on how U.S. and global financial events may affect the economy, interest rates, and ultimately your credit union's performance. Discuss the trends in savings and loan activity, and weigh the influence of economic events on growth for 2008.

Helping Members Recover From the Sub-Prime and Mortgage Crisis

Bill Myers

Decreasing home values, combined with rising payments will put many members into serious financial trouble. Foreclosure rates tripled during 2007 and the inventory of unsold homes is at an all-time high. And worst of all, you may not know a member is in trouble until it's too late. Learn about creative ways to reach out to members who need help, even if you don't currently offer mortgages.

REGISTER ONLINE TODAY!

Visit training.sccul.org and choose Event Calendar.

For assistance, e-mail reginfo@cuna.coop
or call 800-356-9655, ext. 4249.

INSTRUCTORS

Jim Mathis, founder of The Mathis Group, has been leading training conferences and consulting nationally for over 25 years. Author of *Reaching Beyond Excellence*, he helps business leaders improve their leadership skills and know how to help their people work together better.

William Myers founded Alternatives Federal Credit Union and has been the CEO throughout its 28 year existence. From its inception, the credit union has successfully focused on serving underserved markets with services such as youth branches, Business CENTS training, Money Wise financial planning, payday lending alternatives, VITA tax preparation, and Individual Development Accounts.

Ben Rast, founder and senior partner of The Rast Group, works with individuals and institutions to develop appropriate investment and financial planning strategies. A Certified Financial Planner and an Estate Planning Consultant, he frequently speaks to professional groups on the topics of business, economics, investments, and financial planning. Ben has also taught courses at Columbia College and the University of South Carolina.

David A. Reed has 20 years of collections and bankruptcy experience representing both debtors and creditors. Reed is vice president and general counsel for Apple Federal Credit Union in Fairfax, Virginia where he oversees collections, regulatory compliance, and security. Reed lectures regularly on regulatory compliance, consumer lending, bankruptcy, and collections.

HOTEL & REGISTRATION INFORMATION

Embassy Suites Columbia-Greystone

200 Stoneridge Dr.
Columbia, SC 29210
Phone: 803-252-8700
Fax: 803-256-8749

Room rates: \$132 sgl/dbl

Reserve your lodging by April 16, 2008

Tuition

The rate for SCCUMA members is \$115. Credit unions under \$10 million in assets receive a 25% discount. (Non-members may attend for \$145. Please look for "Registration Rate/Promo Code," enter code NREG, and register for \$145).

Confirmations

If you register online and pay with credit card or ACH, you will receive your registration confirmation within three business days. Please allow up to 10 days if you pay by check.

Cancellations

Cancellations received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$50 administrative fee. No refunds will be granted if cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax event and contact information, listing the new participant and who they will be replacing.

AGENDA

•• WEDNESDAY •••••

6:00–7:30 pm

Hospitality in suite 720

•• THURSDAY •••••

6:30–9:00 a.m.

Embassy Suites Breakfast for Hotel Guests

8:00–9:00 a.m.

Registration & Refreshments

9:00–9:20 a.m.

Welcome & Announcements
League Updates, *Garry Parks*

9:20 a.m.–12:15 p.m.

Implementing Organizational Change

12:15–1:30 p.m.

Buffet Lunch

1:30–2:30 p.m.

Strategic Planning

2:45–4:00 p.m.

Vendor Due Diligence & Effective Vendor
Management

4:30–4:45 p.m.

SCCUMA Business Meeting

4:45–7:00 p.m.

Hospitality

•• FRIDAY •••••

6:30–9:00 a.m.

Embassy Suites Breakfast for Hotel Guests

9:00–10:00 a.m.

Economic Update

10:15–11:30 a.m.

Helping Members Recover From the
Sub-Prime & Mortgage Crisis

ADDITIONAL LEARNING OPPORTUNITIES

You'll find links to these additional learning resources at training.sccul.org.

CUNA Branch Management Institutes: Foundations & Strategies

Build effective leadership and management skills and stay in tune with changing trends. Visit training.cuna.org and choose *Schools & Conferences*.

April 14–17 • Baltimore, MD

Tuition \$1,395

October 6–9 • San Francisco, CA

Tuition \$1,295 (*\$1,395 after Aug. 22*)

Management and Leadership Webinars

This is just a sampling of the 150 topics offered this year. A single webinar is \$219, or you can save big with a webinar package. Visit training.sccul.org and choose *Webinars*.

- Credit Union Alternatives to Payday Lending: Best Practices for Marketing Your Program, April 22
- Member Service During the Collection Process, April 24
- Developing Relationships Through Staff Communication, July 30
- Building Collaboration & Cooperation With Your Team, Aug. 6
- Developing Member Service Excellence, Aug. 13
- Legendary Credit Union Leadership, Aug. 20

America's Credit Union Conference & Expo

Power up your credit union with the insights and innovation vital to your credit union's success. Featured speakers include Susan Packard of HGTV; Steve Farber presenting *Radical Leap: Extreme Leadership at Work and Beyond*; and Dan Heath, presenting *Made to Stick: Why Some Ideas Survive and Others Die*. Learn more at events.cuna.org.

June 29–July 2 • New York, NY

Tuition \$895 (*\$400 for CUs under \$35 million*)



CUNA

Credit Union National Association

PO Box 431 | Madison, WI 53701-0431

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Register at training.sccul.org

CUNA
Resource
Link

Sign up now to get the latest training updates from your league and CUNA.
cuna.org/cunaresource/link.html