

SOUTH CAROLINA CREDIT UNION LEAGUE

Credit Union

# LEADERSHIP

## CONFERENCE

for CEOs, executives, managers, and volunteers

August 14-16, 2008 • Hilton Head Island, SC

*take a leap ahead in leadership*

The Power of Partnership



**As a credit union leader** you're constantly dealing with the challenges of change...staying competitive, attracting new members, dealing with a bumpy economy, and managing people. Take this opportunity to break away from your credit union's day-to-day operations to focus on the big picture. You'll gain the understanding and inspiration to reach your individual goals as well as those of your credit union.

## General Sessions

### Increasing Your Leadership Power to New Levels of Excellence

*Dr Jerry Teplitz*

What's it like to have a negative day as a leader? How did you feel at the end of it? Tired and drained? Now, contrast that with a positive day as a leader. Did you feel energized? What if you could create every day to be a great day for yourself? What would that do to your abilities and successes as a leader? In this session, you'll discover ways to boost your energy levels and improve your overall leadership capabilities.

### Disaster Preparedness and Recovery: Lessons Learned From Hurricane Katrina

*Charles Elliot*

The unprecedented devastation and shock of Hurricane Katrina immediately raised the importance of disaster recovery and business continuity planning for credit unions. Discover some of the lessons learned by credit unions that went through the destruction, preparedness, and recovery process. Learn how the credit union system must work together to keep credit unions in business and meeting the financial needs of members.

### Economic Update

*David Brehmer*

Learn how current U.S. and global financial events may affect the economy, interest rates, and ultimately credit union performance. We'll analyze the industry's balance sheet and earnings performance to help you see how your credit union measures up. You'll learn about the trends for savings and loan activity and understand the influence of economic events on credit union growth patterns.

### My Heroes: Lessons of Leadership!

*Mark Adams*

Gain inspiration for preparing your team for whatever lies ahead. You'll learn about diverse, courageous, and risk-taking leaders who've made a difference in the world. You'll hear how John McLendon changed the racial landscape in the United States in 1944 with a secret basketball game between whites and blacks. You already know about John Glenn, but you probably didn't know that Joseph Kittinger paved the way for space exploration with a parachute jump from nearly 20 miles above the earth. As a player of Arab descent on the Israeli National Soccer Team, Abbas Suan has been called both a traitor and a bridge to the future – just by playing the game he loves.

## CEO & EXECUTIVE TRACK

### Future Trends Impacting Financial Services and Credit Unions

*George Towle*

Are credit unions relevant to the emerging consumer? How can we compete in the marketplace? What role can your credit union play in innovative collaborations in the region? This intensive session will focus on top consumer trends and ways to build a culture of innovation.

### The Mortgage Crisis and its Effect on Credit Unions

*Dan Kampen*

Subprime and predatory lending are responsible for an epidemic of housing foreclosures nationwide. So far, credit unions have been dealing with the crisis better than banks, but there are significant challenges facing credit unions. Learn how your credit union's balance sheet and margins may be affected and gain strategies to better position your organization.

### Focusing Your Efforts in the Current Economy

*George Towle*

It may be tough to see the silver lining in today's headlines: a recession, the mortgage meltdown, higher energy costs, and a weaker job climate. Historically, credit unions have found ways to not only survive, but thrive in tough economic times. Learn where to focus your efforts to strengthen member loyalty and grow your credit union.

## MANAGEMENT TRACK

### Measuring Member Loyalty

*Michelle Bloedorn*

It starts with one simple question for members... “Would you recommend us to a friend or colleague?” The result, your Net Promoter Score, is a powerful way to measure and predict growth. Discover how this key question, combined with other research findings, can help you put your credit union on the path to success.

### Sustainable Loan Products: Used Car Lending and Low-Wealth Borrowers

*Rick Menton*

Every year millions of low and moderate income families take out loans for used cars. Learn about successful strategies for creating and offering used car loans to modest income and low-wealth members. Discuss how some of these strategies can work for your credit union.

### Play to Your Strengths: Real Championship Coaching

*Mark Adams*

How do you create a culture that fosters success? How can you identify your employee's strengths to drive remarkable results? How will you improve individual performance and company results, one person at a time? Learn the qualities that set real coaches apart from just managers. When Mark challenges his teams to play to their strengths, the results speak for themselves. You'll discover how to coach your team to success, using tried and true real championship coaching strategies.

## VOLUNTEER TRACK

### The Perfect Board Packet: Understanding the Information in It

*Rick Menton*

Your monthly board packet is a critical ingredient for guiding your credit union. For most directors, that packet is their only connection to the credit union. Learn what information should be in every packet so you can make more informed, sound decisions.

### Modern Credit Union Governance

*George Towle*

Modern, progressive board governance requires that credit union boards establish boundaries for boards and CEOs. Discover the key components of modern governance policy, review the pros and cons, and examine real-life policies. Discover how to focus your board on providing the right kind of leadership for your credit union.

### Compliance Update for Volunteers

*Marcia Sarrazin*

An understanding of compliance issues is increasingly important for all credit union volunteers. In this session, you'll gain a basic understanding of the major regulations that affect your credit union, identify the regulations that impact you, and learn the consequences of non-compliance.

## HOT TOPIC TRACK

### An Inconvenient Truth: Be Relevant to the Marketplace or Disappear

*Dan Kampen*

The marketplace is becoming less and less forgiving of any business that's not meeting market needs. No matter how well you serve members with something they don't need, they will bring their business somewhere else. You'll look at the enormous shifts in today's financial services market and discover how to position your credit union to stay relevant.

### Are You Relevant to Gen Y?

*Jill Jarman Nowacki*

Everyone is trying to attract younger members, employees, and board members – but do you have what they're looking for? Learn how young people can be beneficial in all areas of your credit union. Get an overview of what Gen Y is looking for in a financial institution, place of employment, or volunteer opportunity.

### New Ways to Conduct Member Transactions

*Lynn Kneebone*

Find out about the latest trends and technologies for member transactions. Discover new ways to conduct member transactions, including mobile phone banking, desk-top deposits, cell phone payments, and RFID.

**Who should attend?** All credit union leaders, including CEOs, management teams, and board members will improve their knowledge and enhance leadership skills by attending the Credit Union Leadership Conference. New this year, you can mix and match sessions from four learning tracks to suit your needs!

## Lodging, Golf & Registration

### Hilton Head Marriott Resort & Spa

One Hotel Circle  
Hilton Head Island, SC 29928  
Phone: 888-511-5086  
Fax: 843-686-8450

Room rates: \$189 single/double\*

**Reserve your lodging by July 18, 2008**

As the closest resort hotel to the beach, Hilton Head Marriott Resort & Spa provides the best ocean views Hilton Head Island has to offer. All rooms have private balconies and wireless high-speed Internet. The hotel is in the exclusive Palmetto Dunes area, near Shelter Cove Marina and Harbour Town.

### Golf Outing

Robert Trent Jones Oceanfront Course  
Saturday, August 16, 2008  
Tee Times 12:32 p.m. to 1:36 p.m.  
\$110 per person

Join us for an optional and enjoyable part of the conference. The Robert Trent Jones Oceanfront Course at Palmetto Dunes Oceanfront Resort was completely renovated not long ago at a cost of \$3 million. Readers of *Golfweek Magazine* have ranked it among the best in the Southeast. Its signature hole, the par-five 10th, offers a breathtaking view of the Atlantic Ocean. Your golf registration fee includes cart, green fees, range, bag handling, a soft drink/bottled water, and box lunch.

### Conference Registration

**Leadership Conference** **\$449**

*CUs with less than \$10 million in assets receive a 25% discount by entering code SREG*

**Golf Outing** **\$110**

*Robert Trent Jones Oceanfront Course*

**Guest Registration** **\$199**

*Includes the receptions on Thursday and Friday, lunch on Friday, and continental breakfast on Friday and Saturday*

### For More Information

If you have any questions about registration, please contact Sue Alt at [salt@cuna.coop](mailto:salt@cuna.coop) or call 800-356-9655, ext 4060.

**Confirmations:** If you register online and pay by 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) by August 6, 2008 are eligible for a refund of the amount paid minus a \$50 administrative fee. No refunds will be granted for cancellation requests received after August 6, 2008. 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.

# Register online today!

Visit [training.sccul.org](http://training.sccul.org) and choose *Event Calendar*

For registration assistance, e-mail [reginfo@cuna.coop](mailto:reginfo@cuna.coop) or call 800-356-9655, ext. 4060.



# Featured Speakers



**Dr. Jerry V. Teplitz** is a well-known writer and speaker on leadership, sales development, attitude enhancement, and stress management. He is the author of *Managing Your Stress: How To Relax and Enjoy, Switched-On Living, and Brain Gym for Business*. He teaches people how to have greater business and personal success by tapping into the power of their personal energy.



**Mark Adams** is a professional communicator who helps people from all walks of life become more successful. His background as a championship basketball coach and now a successful businessman, author, and color analyst on ESPN and FoxSportsNet has given him a unique view of what it takes to lead sales, member service, and management teams. Mark will help you improve your communication and coaching strategies by focusing on the fundamentals for success.



**David Brehmer** has served as First Carolina Corporate Credit Union's president and CEO since 1994. Previously, he was president/CEO of San Diego Postal Credit Union. His 28 year credit union career also includes senior management positions at San Diego County Credit Union, Torrey Pines Federal Credit Union, and Torrey Pines Federal, a credit union service organization.



**Charles Elliott, CLE, CUDE**, and president/CEO of Mississippi Credit Union Association, has made dozens of presentations to credit union organizations across the country on Hurricane Katrina and disaster preparedness. In 2006 he received the National Credit Union Foundation's Anchor Award for his "extraordinary strength and perseverance in helping credit unions recover from the worst natural disaster in American history."

*More speaker biographies are listed online.*



## Additional learning opportunities

You'll find links to additional learning resources, including webinar topics, at [training.sccul.org](http://training.sccul.org).

### Management and Leadership Webinars

Here's just a sampling of the webinar topics offered this year. To learn more, visit [training.cuna.org](http://training.cuna.org) and choose *Webinars & eSchools*.

- Developing Relationships Through Staff Communication, July 30
- Building Collaboration & Cooperation With Your Team, Aug. 6
- Legendary Credit Union Leadership, Aug. 20

### CUNA Volunteer Certification School

Join us for the most comprehensive volunteer certification program in the movement.

Visit [training.cuna.org](http://training.cuna.org) and choose *Schools & Conferences*.

September 7–12 • San Diego, CA  
Tuition \$1,695 (\$1,795 after July 25)

### CUNA Community Credit Union Conference

Don't just do it, do it different. To succeed, your products, delivery systems, marketing, and service culture must be tailored to fit your community. This conference is for all credit union leaders who are inspired to shake off the status quo and stand out from the crowd. Register online today at [community.cuna.org](http://community.cuna.org).

October 8–11 • San Diego, CA  
Tuition \$895 (\$995 after August 22)

### CPDOnline: Training for everyone on your team

Put online training to the test with a free 30-day trial! With **CPDOnline**, you get 250 expertly designed self-study courses, along with personal assistance whenever it's needed. To learn more, visit [training.cuna.org](http://training.cuna.org) and choose **CPDOnline**.

### CUNA Training on Demand

This downloadable, video-like training tool provides 30-45 minute expert presentations on credit union topics. Order the training you need, when you need it, and use it as frequently as you want. Visit [training.cuna.org](http://training.cuna.org) and choose *Training on Demand*. Topics include:

- 10 Ratios Every Volunteer Should Know
- Assessing the CEO
- Credit Union Growth Strategies
- Overseeing the Outside Audit

Credit Union

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Register at [training.sccul.org](http://training.sccul.org)

## Agenda

### THURSDAY

- 2:00-3:00 p.m.**  
Registration
- 3:00-4:00 p.m.**  
Economic Update
- 5:00-6:00 p.m.**  
Welcome Reception  
*Sponsored by First Carolina Corporate Credit Union*



### FRIDAY

- 7:45-8:30 a.m.**  
Continental Breakfast
- 8:30-8:40 a.m.**  
Welcome
- 8:40-10:00 a.m.**  
Increasing Your Leadership Power to New Levels of Excellence
- 10:30 a.m.-Noon**  
BREAKOUT SESSIONS
  - Future Trends Impacting Financial Services and Credit Unions

### SATURDAY

- 7:45-8:30 a.m.**  
Continental Breakfast
- 8:30-10:00 a.m.**  
BREAKOUT SESSIONS
  - Focusing Your Efforts in the Current Economy
  - Play to Your Strengths: Real Championship Coaching for Volunteers
  - Compliance Update for Volunteers
  - New Ways to Conduct Member Transactions
- 10:30-11:45 a.m.**  
My Heroes: Lessons of Leadership!
- 12:32 p.m.**  
Golf Outing at Robert Trent Jones Oceanfront Course  
*(separate registration required)*

- Measuring Member Loyalty
- The Perfect Board Packet: Understanding the Information In It
- An Inconvenient Truth: Be Relevant to the Marketplace or Disappear
- Noon-1:15 p.m.**  
Group Lunch
- 1:15-2:45 p.m.**  
BREAKOUT SESSIONS
  - The Mortgage Crisis and its Effect on Credit Unions
  - Sustainable Loan Products: Used-Car Lending and Low-Wealth Borrowers
  - Modern Credit Union Governance
  - Are You Relevant to Gen Y?
- 3:00-4:00 p.m.**  
Disaster Preparedness and Recovery: Lessons Learned From Hurricane Katrina
- 5:00-7:00 p.m.**  
Reception and Silent Auction