

“THE ONES IN RED” PRESENT

**National Human Resource/Personnel Issues
Credit Union Conference®**

MGM Grand & Casino at Foxwoods

August 3 – 6, 2009 • Mashantucket, Connecticut



• WHO WILL ATTEND •

**Human Resources Managers & Staff • Training Managers
CEOs • Directors • Branch Managers
Marketing Managers • Supervisory Committee Members
Treasurers • Committee Members**

30th Anniversary



1979

2009

exclusively

Educating the Credit Union Community [✓] Since 1979

30th Anniversary



WE'RE "THE ONES IN RED"

At CU Conferences® we've been dedicated to educating the credit union community exclusively since 1979. And we're proud to note that many who attend our conferences are loyal, repeat participants.

What sets us apart? Spectacular locations, a relaxed atmosphere, sit-down meals and meeting environments that are perfect for plenty of networking and for allowing you the personal attention you deserve.

Should you need anything at all while you're at our conferences – if you have questions or problems or even if you just want to shoot the breeze – look for a member of our CU Conferences® staff.



You can't miss us.

We're "The Ones in Red."

We appreciate your participation, and we are here to do whatever it takes to make your conference experience a cut above the rest.

888-465-6010

www.cuconferences.com
www.theonesinred.com

"Disarming Stress"

PreConference Workshop Presented by:
Timothy Quinn, Owner/Operator, Cross Roads

"We are not suited for the lifestyles that we have created for ourselves, and the pressures of every-day life are taking their toll both emotionally and physically. We find ourselves under greater and greater strain as we strive to provide more for our clients, partners, employers, families and friends. This stressful lifestyle is so common that we often are not even aware of it until we reach our limit."

Quinn will lead you through some self-analysis to find out where your stress is originating and to uncover the tools that you already possess to effectively calm these areas—and take back control of your life. You cannot control all the factors that create stress in your life but you can absolutely control how you react to them. This workshop will help you to develop the tools to change the way you react to these situations . . . before they change you.

Timothy Quinn comes to our PreConference Workshop with a tool box filled from his vast experiences. He has worked for several advertising/marketing agencies and operated Quinn & Company for 15 years specializing in event management and internal promotions. Clients often called upon Tim's presentation skills to train and motivate employees as well as launch new campaigns leading to the founding of *Success From The Inside Out* in 1990.

Tim has spoken throughout the Americas and Europe on subjects ranging from Communication Skills, Team Building, Time Management, Personal Development, Sales Training and Motivation and operates as a facilitator, keynote speaker, workshop leader and trainer for other speakers delivering "Train the Trainer" programs for clients.

Cross Roads provides services to regional, state and national associations, government agencies, private businesses and individuals throughout the Americas and Europe. Working together with these various organizations they present training workshops that offer continuing education units (CEU's) to members for certification in their specialty areas.

MONDAY, AUGUST 3, 2009

PreConference Workshop

▪ Separate Registration Required ▪

"Disarming Stress"

Presented by Timothy Quinn

Only \$225

11:30 a.m. – 1:00 p.m.

PreConference Registration

1:00 – 1:15 p.m.

Introduction

1:15 – 2:15 p.m.

PreConference Workshop

2:15 – 2:30 p.m.

Networking/Refreshment Break

2:30 – 4:30 p.m.

PreConference Workshop (continued)

4:30 – 4:45 p.m.

Workshop Summation

www.cuconference.com

www.theonesinred.com



National Human Resource/Personnel Issues Credit Union Conference®

The Experts . . .

▪ August 3 – 6, 2009 ▪

- Walter Jankowski, P.E.** *Reinvention Consultant, Beacon Technologies*
- Sandra Dickerson** *CEO & HR Director, Your People Professionals*
- Tom See** *HR & Management Consultant, SPHR, Your People Professionals*
- Karen Saul** *Attorney, Farleigh Wada Witt*
- Denny Graham** *President & CEO, FI-Strategies, LLC*
- Bill Farley** *Sales Manager – Select Sales, CUNA Mutual Group*
- Phyllis Shun-Hannah** *Northeast Region Field Services Director, SHRM*
- Fran Tralease** *Owner, Tralease Communications*

Plus . . . PreConference Presenter:

Timothy Quinn *Owner/Operator, Cross Roads*

▪ **Monday, August 3, 2009** ▪

5:00 – 6:00 p.m. **Registration** ▪ National Human Resource/Personnel Issues Credit Union Conference®

6:00 – 7:00 p.m.  **WELCOME RECEPTION**

Enjoy cocktails and light dining while mingling with your peers and their guests, our informed experts and “The Ones in Red”

▪ **Tuesday, August 4, 2009** ▪

8:00 – 9:00 a.m.  **SIT-DOWN BREAKFAST**

9:00 – 9:10 a.m. **Introduction**

9:10 – 10:10 a.m.
Managing and Improving Your HR Processes

Walter Jankowski P.E.

Reinvention Consultant, Beacon Technologies

Recruiting, hiring, on-boarding, training, administering benefits, managing performance, disciplining, firing, compensation, and compliance reporting - Human Resources core processes are critical to any high performance organization. How well is your HR department providing consistent, repeatable, measurable, and ever improving processes? In this session we will look at how to build your HR Center of Excellence.

10:10 – 10:25 a.m. Networking/Refreshment Break

10:25 – 11:25 a.m.

Effective Performance Management

Sandra Dickerson, CEO & HR Director

Tom See, HR & Management Consultant, SPHR
Your People Professionals

Virtually every business is looking for ways to maintain profitability in this economy. That means looking at ways to maximize performance.

Under the guidance of Dickerson & See, you'll learn how to maximize human capital by discovering the processes and tools for improving the performance of employees and managers.

- Achieving success using state-of-the-art-assessment and coaching tools
- Clarifying expectations
- Setting goals

This session is a unique integration of contemporary processes with state-of-the-art online assessment and coaching tools. Gear up to challenge an economic recession that is depleting company revenue and profitability and find out how to maximize performance of your credit union's employees.

11:25 a.m. – 12:25 p.m.

Preventing & Correcting Sexual Harassment

Karen Saul, Attorney, Farleigh Wada Witt

Sexual harassment remains a liability risk in today's highly litigious world. But the goals of teamwork, productivity and employee retention are thwarted by sexual harassment, even when litigation does not result. Sexual Harassment undermines a credit union's cultural values, ethical standards and ability to serve members. Yet, what constitutes sexual harassment is widely misunderstood.

Credit union managers and volunteers must be able to identify sexual harassment, learn how to prevent it from happening and know how to respond if it occurs.

11:25 a.m. – 12:25 p.m. (continued)

This session will provide information and guidance on how to achieve these objectives, based on Saul's more than 25 years' serving credit unions as an employment lawyer.

- What is sexual harassment?
- What are the basic laws that apply?
- What can be done to prevent sexual harassment?
- What must we do if sexual harassment happens at our CU?

12:25 – 1:30 p.m.  **SIT-DOWN LUNCHEON**

1:30 – 2:30 p.m.

Linking Your Human Resources Strategy to Your Strategic Plan

Denny Graham, President & CEO, FI-Strategies, LLC

Most credit unions do a great job of planning their strategies on the financial, operational and marketing aspects of their business. But, even though the “people expense” is usually the largest line item in a credit union budget, it's often ignored in the strategic plan. And yet getting the right people in place—from the CEO to the tellers—is the factor that will ultimately make or break your CU.

In this session, Denny will address the highly emotional, evolving and often overlooked portion of your business planning: the human resource side. Learn how to link HR policies, from recruiting to retention, to your strategic plan as you examine:

- The role of people in your success
- The role of the board in HR
- The evolution of HR policies in most credit unions
- Establish an HR strategy that links to your CU's strategic plan
- How to establish compensation philosophies
- How incentives and bonuses link to your philosophy
- Benefits – how much are enough?
- Metrics to determine the success of your strategy

2:30 – 3:30 p.m.

Talent Management for Today

Bill Farley, Sales Manager – Select Sales, CUNA Mutual Group

Finding the “Stars” in today's workplace can be a challenge. This timely session focuses on:

- Identifying top talent
- The true meaning of “accountability”
- Driving top talent to peak performance
- Challenging and rewarding the “Stars”
- Retaining top talent once cultivated

Throughout Bill's informed, lighthearted presentation he encourages your questions and comments and will leave you with a new perspective on talent and accountability.

3:30 – 3:45 p.m. **Daily Summation**

▪ **Wednesday, August 5, 2009** ▪

9:00 – 9:05 a.m. Introduction

9:05 – 10:00 a.m.

**HR and Business Ethics:
Lesson from the Downturn**

Phyllis Shun-Hannah

*Northeast Region Field Services Director, SHRM
(Society for Human Resource Management)*

The current financial crisis has put business ethics back in the headlines, and we have to ask ourselves: What more can HR professionals do to create ethical business cultures that will deter these questionable business practices in the future?

This presentation looks at the six basic building blocks of a comprehensive business ethics program, the ethics requirements mandated by the Sarbanes-Oxley Act, and research data from several recent studies, including SHRM's 2008 survey, "The Ethics Landscape in American Business." Participants will also take away a better sense of how to get employees excited about ethics using innovative tools such as Cisco's "Ethics Idol" program.

10:00 – 10:15 a.m. Networking/Refreshment Break

10:15 – 11:00 a.m. **ROUNDTABLE DISCUSSION**

One of the greatest values of attending a national conference is to have the opportunity to network with other credit unions from throughout the country. This session allows you the time to exchange ideas with your fellow CU professionals. You will have the chance to share your credit union's challenges and successes while gaining knowledge from other credit unions. You won't want to miss this invaluable opportunity.

11:00 a.m. – 12:00 p.m.

**Managing Diversity and
Cultural Issues in the Workplace**

Fran Tralease

Owner, Tralease Communications

You'd be hard pressed today to find a business that doesn't transact in some way with a stakeholder who lives a different lifestyle, was born in a different generation, hails from a different culture or is a member of a different ethnicity or religion. U.S. Census Bureau data shows our country's population is becoming increasingly diverse and international, with no one "majority" group in the workforce.

Whether you're an accountant, operations manager, or seller of computer software, the opportunity to interact with other customs opens amazing doors of opportunity. We all deserve to feel respected as professionals in our fields. And we all aspire to understand, and be understood by those around us.

11:00 a.m. – 12:00 p.m. (continued)

In this must-attend session, Fran Tralease will share with you the keys to effective collaboration across diverse groups, in order to reach and achieve common goals.

- Explore decision-making and collaborative sharing across diverse work teams
- Break down barriers to communication among dissimilar co-workers, as well as clients and business partners
- Maintain effective workplace relationships
- Develop the qualities of analysis, creativity, tolerance & leadership

12:00 – 1:00 p.m.  **SIT-DOWN LUNCHEON**

1:00 – 2:00 p.m.

Building Teams in Your Boardroom and Business

Walter Jankowski, P.E.

Reinvention Consultant, Beacon Technologies

Team: "A small group of people with complimentary skills committed to a common purpose, performance goals, and approach for which they hold themselves mutually accountable."

Whether it's getting your Board to work together or empowering your frontline staff to build a high performance workplace, teams are an effective way to get work done.

In this high-energy, interactive session, Walt will discuss:

- Five surefire ingredients for creating a team
- The two types of teams— self-directed and project oriented
- Stages of team development

He'll also show examples of high performance teams and disclose his "Top 10 Tips" for building your team. You'll take away tools and techniques for building your Board, sub-committee, staff and organizational teams.

2:00 – 3:00 p.m.

Change Leadership in a Changing World

Bill Farley, Sales Manager–Select Sales, CUNA Mutual Group

Credit unions must consider and implement radical change in order to thrive – even survive in today's financial world.

With credit unions being at a "strategic crossroads" it is more important than ever for you, as a credit union leader, to have a greater insight into how to execute organizational change and be poised for a competitive advantage in your marketplace.

In Bill's "open discussion" presentation he not only discusses the importance of change, but provides the key principles of how to change effectively.

3:00 – 3:30 p.m. Conference Wrap-Up



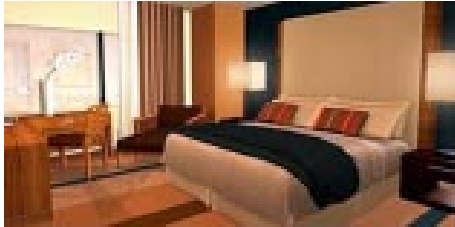
▪ **Thursday, August 6, 2009 – Travel Day** ▪

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Deluxe rooms beautifully appointed, with Monoco imported linens, feather-pillow topped beds, flat-screen televisions, up-to-date electronic capabilities, marble rain-fall showers and French toiletries.



The impressive yet intimate 4,000-seat MGM Grand Theater showcases the world's most talented performers, hottest concerts, thrilling sports events and popular off-Broadway shows.



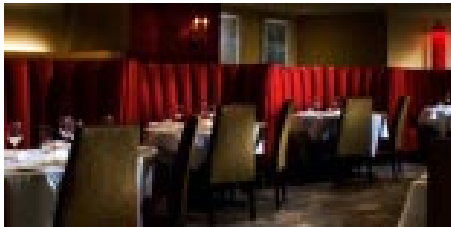
Dip into a lavish 5,500-square-foot fan-shaped outdoor pool then relax in a chaise lounge while enjoying a beverage poolside. Enjoy a refreshing massage at world-class, luxurious G-Spa.



New England's finest two championship courses, designed by golf course architect Rees Jones, are waiting to challenge you with rolling terrain, dramatic elevation changes & gorgeous views.



Whatever your game, you'll surely find it in this vibrant 50,000 square-foot casino. Feel the pull of 1,400 slot machines and 60 gaming tables including blackjack, Texas Hold'em and more.



Enjoy the elegance of Alta Strada's Italian cuisine & fine wines, New England-style specialties at Durgin Park Oyster & Chowder Bar or a cocktail and good conversation at the trendy Center Bar.



Rates As Low As \$199!

Reserve Your Room Now!

Call MGM Grand at Foxwoods directly at 888-369-9663. Mention CU Conferences Code M1-1314 to receive special rates as low as \$199

Driving Directions to Foxwoods:

Providence, RI – TF-Green Airport
Take I-95 South to Exit 92 in Connecticut. Go straight at the stoplight. At the next stoplight, turn right onto Route 2 West. Foxwoods is eight miles west on Route 2.

Hartford, CT – Bradley International Airport
Take I-84 East to Exit 55, Route 2 East. You'll find the resort nine miles past Norwich.

Shuttle Service to Foxwoods:

Providence, RI – TF-Green Airport
Shuttle service is available through Conway Tours. Call 1-800-888-4661, Monday – Friday from 9:00 a.m. to 5:00 p.m. EST.

The shuttle departs TF-Green Airport only at these times: 11:00 a.m., 6:00 p.m. and 10:00 p.m.

■ SHUTTLE RESERVATIONS ARE REQUIRED ■

Hartford, CT – Bradley International Airport
Shuttle service is not available from this airport.

And an Experience You Will Want to Share!

SPOUSE/GUEST PROGRAM – Only \$149 Separate Registration Required.

CU Conferences® has made it affordable and fun to share your New England experience with your spouse or special guest. For only \$149 your registered guest is welcome to join you during Monday's **Welcome Reception**, Tuesday's **Sit-Down Breakfast & Luncheon** and Wednesday's **Sit-Down Luncheon**.

Your registered Spouse or Guest is welcome to join you at these (♂♀) CU Conferences activities.



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Four Easy Ways to Register

Registration is **NOT** guaranteed until payment is received

Credit Card or Check Payment:

- 1. Online:** www.cuconferences.com
- 2. Fax:** 314-961-7025
- 3. Call:** 888-465-6010
(Please have credit card information available)
- 4. Mail registration and payment to:**
CU Conferences
 8711 Watson Road, Suite 200
 St. Louis, MO 63119

Cancellation Policy: If you need to cancel for any reason, you are welcome to send a substitute. Or, if you cancel in writing at least 10 business days prior to the conference date, a refund check for the full amount will be mailed to you. There are no refunds for cancellations made less than 10 business days prior to the conference date. However, your credit union may apply the registration fee paid to any future conference. Registrants who do not attend are liable for the full conference fee.

Please Note: CU Conferences reserves the right to photograph official events and sessions for exclusive use in marketing materials.

For Hotel Reservations:

Please call MGM Grand at Foxwoods directly at 888-369-9663.

Mention CU Conferences code M1-1314 to receive special rates starting at \$199.

For Complete Travel Assistance:

Altair Travel & Cruises:
 800-264-3316
 Monday - Friday 8:30 a.m. - 5:00 p.m. CST.

UPCOMING CREDIT UNION EDUCATION CONFERENCE:

Credit Union Services & Products (S&P) Forum
SEPTEMBER 14 - 17, 2009

Hotel Del Coronado
San Diego, California

CU CONFERENCES®

National Human Resource/Personnel Issues Credit Union Conference® ■ AUGUST 3 - 6, 2009

MGM GRAND RESORT & CASINO AT FOXWOODS, CONNECTICUT

Register Early & Save!

1st PARTICIPANT:

Name _____ Title _____ Nickname for ID Badge _____ Email Address _____ Spouse/Guest Name _____ Spouse/Guest Nickname for ID Badge _____	PreConference Workshop	National Human Resource/Personnel Issues Credit Union Conference®
	"Disarming Stress" Presented by Timothy Quinn <input type="checkbox"/> \$225	On or Before June 3, 2009 <input type="checkbox"/> \$845
		June 4 Through July 1, 2009 <input type="checkbox"/> \$895
		After July 1, 2009 <input type="checkbox"/> \$945
	<input type="checkbox"/> SPOUSE/GUEST PROGRAM <input type="checkbox"/> \$149	
PreConference & Main Conference Subtotal: \$ _____		

2nd PARTICIPANT:

Name _____ Title _____ Nickname for ID Badge _____ Email Address _____ Spouse/Guest Name _____ Spouse/Guest Nickname for ID Badge _____	PreConference Workshop	National Human Resource/Personnel Issues Credit Union Conference®
	"Disarming Stress" Presented by Timothy Quinn <input type="checkbox"/> \$225	On or Before June 3, 2009 <input type="checkbox"/> \$845
		June 4 Through July 1, 2009 <input type="checkbox"/> \$895
		After July 1, 2009 <input type="checkbox"/> \$945
	<input type="checkbox"/> SPOUSE/GUEST PROGRAM <input type="checkbox"/> \$149	
PreConference & Main Conference Subtotal: \$ _____		

3rd PARTICIPANT:

Name _____ Title _____ Nickname for ID Badge _____ Email Address _____ Spouse/Guest Name _____ Spouse/Guest Nickname for ID Badge _____	PreConference Workshop	National Human Resource/Personnel Issues Credit Union Conference®
	"Disarming Stress" Presented by Timothy Quinn <input type="checkbox"/> \$225	On or Before June 3, 2009 <input type="checkbox"/> \$845
		June 4 Through July 1, 2009 <input type="checkbox"/> \$895
		After July 1, 2009 <input type="checkbox"/> \$945
	<input type="checkbox"/> SPOUSE/GUEST PROGRAM <input type="checkbox"/> \$149	
PreConference & Main Conference Subtotal: \$ _____		

Please Register Additional Conference Participants and Guests on Separate Sheet.

Total Amount Due: \$ _____
 (Based on PreConference and Main Conference Registration Date Selected)

CREDIT UNION INFORMATION:

Credit Union Name: _____	Asset Size: _____
Contact Person: _____	Contact Person's E-mail: _____
Street Address: _____	City: _____ State: _____ Zip: _____
Phone Number: (____) _____	Fax Number: (____) _____

METHOD OF PAYMENT/CREDIT CARD AUTHORIZATION:

CU Conferences® is authorized to **CHARGE** my **VISA** **MASTERCARD** in the amount of: \$ _____

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ENCLOSED is my **CHECK** made payable to **CU Conferences** in the amount of: \$ _____