

Connecticut Credit Union Leadership Conference 2010



Photo by Robert Powers

***Hotel Viking
Newport, Rhode Island
September 10 – 12, 2010***

Friday

CEOs and Management

1:00 – 2:30 **Making Your Credit Union Relevant to Young Adults** – Ben Rogers
Credit unions across the country are seeing lending decline as the average credit union member's age increases. The challenge is to attract members who are building their future and looking for an institution to partner with them to achieve their goals. This session will look at growth through partnering with young adults rather than trying to sell them on specific products. Ben will talk about integrating this essential demographic to build your credit union's future.

2:45 – 4:15 **Who Do We Need to Be to Survive?** – Lois Kitsch
Every credit union faces the challenge of increasing membership while keeping their credit union's uniqueness. Growth is vital, and keeping our credit union philosophy a key component in the growth is key to the credit union movement's future. How can your credit union increase membership while promoting your credit union's uniqueness? Lois will review credit union best practices throughout the U.S. that are succeeding in growth while embracing credit union uniqueness.

Volunteers

1:00 – 2:30 **Your Credit Union's Future** – Lois Kitsch
The current credit union environment is a challenge to even the most seasoned volunteer. How can you focus on credit union growth while you are defensively focusing on risk, governance, regulations, etc.? This session challenges the idea of focusing only on defense and suggests volunteers look at the credit union offensively – investing in your credit union by identifying and strengthening the positives of credit unions. Join peers in learning what credit unions throughout the U.S. are doing to change the face of the credit union movement one credit union at a time. This session will leave you with ideas to contemplate while entering your strategic planning session for 2011 and beyond.

2:45 – 4:15 **A Seat at the Table: Young Adult Directors and Board Advisors** – Ben Rogers
Credit union volunteers are overwhelmingly older than 50. A recent Filene Research Institute study shows that only 6% are 39 or younger. But this is not a session advising credit unions to blindly place a young person on the board, rather this is an open discussion on options to invite a younger perspective into board discussions. Ben will review best practices from a variety of non-profit entities and discuss how these approaches may work in your credit union.

5:30 – 7:00 **Cocktail welcome reception**

Dinner on your own

Saturday

7:30 – 9:00 Breakfast

7:45 – 8:45 **BSA Update for Volunteers** (breakfast meeting) – Nick Moalli
The Bank Secrecy Act requires annual training for credit union volunteers. Nick will review BSA, USA Patriot Act and OFAC to bring volunteers in compliance with training requirements. Attendees can register to receive a certificate of attendance for future examiner review.

9:00 – 10:00 **Your League – Past, Present and Future** – Anthony Emerson
The League environment is changing as rapidly as the credit union environment. Tony will take participants through League changes in Connecticut and nationally, then share some of the plans your League has for the future. This is an opportunity to review the value received from your dues dollars and how your credit union can become more active in the League.

10:15 – 11:45 **Serving the Future** – Ben Rogers
Ben reviews opportunities credit unions have to reach out to our future members by identifying their needs and how CUs can capture not only the immediate business, but their loyalty to build a long-term relationship. Areas of discussion include:

- Bringing generation debt into focus
- Money management
- Communication channels
- Using credit union philosophy and values to attract members
- Where to start

Lunch and afternoon on your own

5:30 – 6:30 Wine reception (optional)

6:30 – 8:00 Dinner (optional)

Sunday

7:30 – 9:00 Breakfast

8:30 – 9:30 **Early Newport – Before the Mansions**
What was Newport like before the Gilded Age and the Bellevue Avenue mansions? A speaker from the Newport Historical Society will take participants through Newport's lively history during an illustrated presentation.

9:45 – 11:00 **Making Your Life Count** – Jack McCall
In a world where the rules seem to be constantly changing, it is easy to get caught up in the speed of life. We seem to be overwhelmed with emerging technologies, changing populations and jam-packed schedules. Through the perplexity of it all, one of life's great questions will invariably rise to the surface: How can I make my life count?

Speaker Biographies

Anthony L. Emerson

Tony has been President/CEO of the Credit Union League of Connecticut since 2008. Prior to coming to Connecticut Tony served as VP of Finance/Accounting/Operations for Maine Savings FCU. He has served on various Boards of Directors, Steering Committees, League Committees, and served a two-year term as a Chapter President. Tony has earned degrees in Contract Law, Logistics Management, Accounting, Master of Business Administration, and a Doctorate in International Business, as well as being a graduate of The Academy of Military Science. He has been published numerous times on topics that include: strategic management, member service, the service-profit chain, employee empowerment, cooperative financing models and a variety of other business related topics.

Lois Kitsch

Lois has been the National Program Manager of the REAL Solutions program at the National Credit Union Foundation since 2006. In addition to holding management positions in credit unions in Florida and North Dakota, her prior experience includes working at Filene Research Institute and World Council of Credit Unions where she managed credit union development projects throughout Europe and Asia. She has actively promoted credit union development in over 30 countries. Lois has received the designation of Credit Union Development Educator for the United States, Australia, Asia and the Philippines and has been recognized for her professional and volunteer work several times. She has received the prestigious Herb Wegner Memorial Award for Individual Achievement and has also been awarded the Herb Wegner Memorial Award for Outstanding Project (CUES Philippines): the Annie Vamper Helping Hands Award from the National Federation of Community Development Credit Unions; and several awards from Filipino cooperative organizations and public charities. Lois has addressed credit union audiences in Europe, Asia, Africa, Australia and the US on relevant credit union topics.

Jack McCall

Jack is a graduate of the University of Tennessee, the Tennessee School of Banking at Vanderbilt University, and the Graduate School of Banking of the South at Louisiana State University. He began his career as a marketing specialist for the Tennessee and U.S. Departments of Agriculture. Over a span of twenty years Jack distinguished himself as a financial services professional and healthcare executive. After developing his storytelling craft for over thirty-five years, he left the corporate world in 2000 and founded Jack McCall, Inc., a professional speaking/training firm based in Hartsville, Tennessee.

Nick Moalli

Nick is Assistant Vice President of Credit Union Services at the Credit Union League of Connecticut. He is also the lead for the Small Credit Union Task Force, focused on improving resources for small credit unions in Connecticut. Nick received a Bachelor's degree in Management with a focus in accounting and finance from the University of Massachusetts.

Ben Rogers

Ben is the Research Director of the Filene Research Institute where he manages and edits a large pipeline of economic, behavioral, and policy research related to the consumer finance industry. He has authored nearly twenty Filene reports, including the Institute's recent young adult research, recruiting studies, and upcoming consumer financial protection and cooperative management reports. Ben previously served as director of the Institute's [CU Tomorrow project](#), as manager of the popular 30 Under 30 group, as editor of the *CEO Report*, and as chairman of the National Directors' Convention. Ben has been cited in the *Wall Street Journal*, *American Banker*, the *Credit Union Times*, and the *Credit Union Journal*. He earned a master's degree from Northwestern University and a BA from Brigham Young University.