



RIGHT TIME. RIGHT PLACE. **RIGHT SOLUTION.**

2018 MANAGEMENT ROUNDTABLE

SEPTEMBER 20 & 21

SAMOSET RESORT

ROCKPORT MAINE



Maine Credit Union League

THURSDAY, SEPTEMBER 20

NOON – 1:00 PM LUNCH

1:00 – 3:30 PM THE RIGHT “MOVES” FOR CREDIT UNIONS IN TODAY’S ECONOMY: 10 KEY STRATEGIC MOVES CREDIT UNIONS MUST MAKE IN 2018 AND BEYOND

This provocative presentation will get the juices flowing for credit union leaders to look at the future through the eyes of today’s economic and marketplace challenges. This is an opportunity for any strategic minded credit union leader to expand his or her horizons for where our movement can be tomorrow if the right decisions are made today. RIGHT “MOVES” will examine these key strategic issues:

- How can Credit Unions Take Advantage of Today’s Economic Growth?
- How Crucial is Credit Union Growth Today?
- What Does Serving Persons of Modest Means Mean Today?
- Are Mergers Good or Bad for the Movement?
- Can Credit Unions Continue to Survive the Taxation Fight?
- What’s up with Regulation, Will it Slow Down Under President Trump?
- What’s the Future of CUSOs and Shared Branching?
- Capital and ROA, What is the Right Amount?
- FOM: An Analysis of Field of Membership Options



Speaker: Chris Dollar, Senior Consultant - Dollar & Associates

Chris is an Associate Consultant for Dollar Associates, LLC, a full-service consulting group focusing on credit unions and the organizations that serve them. Chris joined Dollar Associates in 2005. In his role as consultant, Chris has combined his knowledge of credit union issues with practical experience working on the credit union front-lines to facilitate strategic planning sessions for credit unions across the country and become a leading expert in credit union field of membership. In his time at Dollar Associates, Chris has been instrumental in helping many credit unions expand their existing field of membership to create essential membership diversification. Chris is a frequent speaker throughout the country in areas of credit union development and strategy.

3:30 – 4:30 PM ROUNDTABLE DISCUSSION/LEAGUE UPDATE

League President Todd Mason will highlight issues impacting Maine credit unions today and what the Maine Credit Union League and Synergent are doing to strengthen the credit union position in the marketplace.



Speaker: Todd Mason, President/CEO, Maine Credit Union League

Todd began his duties as President/CEO of the Maine Credit Union League and Synergent in April 2017. Prior to his appointment as President/CEO, Todd served as Chief Strategy Officer for RouteOne, an indirect automotive lending technology company. Prior to this, he enjoyed a 19 year career with the Michigan Credit Union League and Affiliates where he served in a variety of capacities ranging from Vice President of Technology, Education and Marketing; to Chief Operating Officer for CU Solutions Group. He also helped launch the cooperative venture League InfoSight, where he served as its Chief Operating Officer.

5:30 – 6:30 PM CONFERENCE RECEPTION

6:30 – 8:00 PM DINNER BUFFET

Conference reception and dinner sponsored by Synergent, CUNA Mutual and Tricorp FCU

FRIDAY, SEPTEMBER 21

7:30 – 9:00 AM

CONTINENTAL BREAKFAST

9:00 – 11:00 AM

BUSINESS LENDING: GROWTH STRATEGY FOR LOANS AND NEW MEMBERS

Business lending is one of the fastest growing segments in lending and many credit unions are unfamiliar with what it takes to enter this market. It is the number one question about loan growth in Don Arkell's consultant practice. This session will cover:

- Consumer Lending Landscape - Challenges in that market that make the case for entering a new market
- Real Estate Lending Landscape
- Marketplace for Business Lending
- Rising Rate Environment - Product Design from an ALM Perspective
- Demographic Changes - Rental Market Opportunities/Multi-Family Residences
- Increased Complexity and Regulation
- Benefit of Business Lending - Increasing Penetration in Local Markets
- Benefits of Business Services for Member Growth
- Execution Challenges and Strategies



Speaker: Don Arkell, Senior Consultant - CU Lending Advice

Don's unique leadership style and passion for Sales and Leadership have made him a sought-after speaker, trainer and strategist. He joined the team at CU Lending Advice, LLC, in 2015 and works with credit unions around the country helping them grow their loan programs, organizational design, lending technology and strategic planning. Don started his career working in all areas of Sales and Lending and eventually he founded a CUSO owned by Clark County CU—Members Auto Brokerage Service, Inc. In 2007, he joined Red Rocks Credit Union in Colorado. He helped them transform their lending and member service from full retail delivery to remote delivery.

11:00 AM - NOON

DESIGNING CREDIT UNION CULTURE FOR HIGH PERFORMANCE

The culture of an organization takes on many shapes and definitions. But one thing we know is certain: organizations with "strong" cultures – well-defined values, words and actions that actually uphold those values and behaviors that encourage the staff to come along in the journey – have greater success in tangible measures like ROI, net income, sales growth and cash flow. We'll guide you through a Center of Excellence for Organizational Entrepreneurship report from a Filene Research Fellow that outlines the opportunities for credit unions to foster high-performance cultures and we'll look at organizations that are already doing it right. And yes, stealing their ideas and successes are highly encouraged.



Speaker: Erin Coleman, Senior Impact Director at Filene Research Institute

Erin is a spirited credit union advocate with an internal compass that points to making the world a better place. She places deep value on learning, honesty, and integrity. As Filene's Senior Impact Director, Erin, with two decades experience in the credit union industry, will help credit unions create and execute on actionable strategies that will help solve their challenges and achieve their goals.

NOON – 1:00 PM

LUNCH

1:00 – 2:00 PM

DESIGNING CREDIT UNION CULTURE FOR HIGH PERFORMANCE (CONTINUED)

2:00 - 2:30 PM

CONFERENCE RECAP AND DISCUSSION

2:30 PM

ADJOURN





OVERNIGHT ACCOMMODATIONS

To make room reservations, please use this link [ME Credit Union League - MGT Roundtable](#) or contact The Samoset directly at 1-800-341-1650. A block of rooms is available for Thursday evening, September 20, at room rates of \$204 and \$226 per room. Please mention the Maine Credit Union League conference when making your reservations and provide the hotel with a copy of your tax exempt certificate.

THE DEADLINE FOR ROOM RESERVATIONS IS AUGUST 17, 2018.

Reservations made after the August 17 cut-off date will be based on availability and may also be subject to the prevailing hotel room rate.

PRICING

The cost for the program is \$299 per person (\$449 for League Associate Members).

The program price includes speakers, materials, two lunches, continental breakfast, and breaks..

Deadline for registration is September 14, 2018. No refunds will be allowed after this date.

REGISTRATION

SEPTEMBER 20 AND 21, 2018 • THE SAMOSET RESORT

Credit Union: _____

Name: _____ Email _____

Name: _____ Email _____

Name: _____ Email _____

Please indicate number attending dinner on September 20 _____

DISCUSSION TOPIC SUBMISSION

Please discuss the following topics during the Roundtable:

FOR YOUR CONVENIENCE, REGISTER 1 OF 3 WAYS:

(1) FAX
207.773.0957
Attn: Member Services

(2) PHONE
1.800.442.6715
Ask for Member Services

(3) EMAIL
Email registration form to:
serlandson@mainecul.org



Maine Credit Union League