

FACING CHALLENGES · FINDING SOLUTIONS



Maine Credit Union League

2021

CREDIT UNION INFORMATION

AGENDA (subject to changes)

Wednesday, August 18, 2021

- 9:30 A.M.
Annual Credit Union Golf Tournament
Belgrade Lakes Golf Club, Belgrade

Thursday, August 19, 2021

- 7:30 to 8:30 A.M.
Breakfast – State of Maine Ballroom
- 8:00 A.M. to 1:00 P.M.
Registration – Lobby
- 8:00 A.M. to 3:30 P.M.
Exhibits Open – Casco Bay Room
- 9:00 A.M. to 3:30 P.M.
Silent Auction Open for Bidding
- 9:30 to 10:30 A.M.
Welcome and Opening Session – Ballroom
- 10:30 to 11:45 A.M.
General Session – Ballroom
- 11:45 A.M. to 1:30 P.M.
Lunch/Exhibits Open
- 1:30 to 2:30 P.M.
General Session – Ballroom
- 2:45 to 3:30 P.M.
General Session – Ballroom
- 3:30 to 4:30 P.M.
CU/Vendor Social Hour – Casco Bay Room
- 5:00 P.M.
Dinner on Your Own

Friday, August 20, 2021

- 8:00 to 9:00 A.M.
Light-Hearted Breakfast with guest
Juston McKinney
- 9:00 to 10:00 A.M.
Opening Session – Ballroom
- 10:15 A.M.
Annual Awards – Ballroom
- 10:30 to 11:30 A.M.
Closing Session – Ballroom

Opening Session • Thursday, August 19

MATT LIGHT: MORE THAN JUST FOOTBALL

In 2001, Matt Light and his wife, Susie, established The Light Foundation—a non-profit organization that exists to give at-risk kids a better chance at leading healthy lives by using the great outdoors to learn and grow. On 500+ acres of land in Ohio, The Foundation holds its outdoor leadership camp. Matt's talk will highlight his dedication to giving back to the community and how his vision and leadership have helped kids become champions in the game of life.



Speaker: Matt Light

Matt Light is a true team player and champion. Drafted out of Purdue University by the New England Patriots in the second round of the 2001 NFL Draft, he played 11 seasons with the team helping them win five AFC Championships and three Super Bowl crowns. While playing football, Matt graduated from the Wharton School of Business at UPenn and Harvard Business School's Entrepreneurial Program. In 2008, Matt was presented the President's Volunteer Service Award by President George Bush for his outstanding work in the community.

Opening Session • Friday, August 20

RAISE THE BAR (BELIEFS • ACTIONS • RESULTS)

One of the most painful things to see is a bold, confident employee fall into the trap of mediocrity. Even great employees can be subject to run-of-the-mill habits and the slump of repetitive routines. This program encourages attendees to uncover ways to Raise the B.A.R. by turning beliefs into actions and achieving results. Dr. Jones will show us how to define and evaluate our beliefs by what works and what doesn't work; capitalize on actions that increase and demand higher expectations; and demonstrate strategies to motivate your team to reach new heights.



Speaker: Dr. Samuel Jones

Dr. Jones is an author, speaker and leadership trainer with a consulting business called Life Changing Presentations™. His programs impact professionals at all levels and help people to succeed in work and life by discovering their purpose, enhancing performance, and building partnerships. After growing up in a fatherless home with his grandmother and struggling through school with a speech impediment, Dr. Jones would later spend a year in Finland and discover a deeper purpose for his life. He learned the value of service, life-long learning, and building partnerships to help others succeed in their work and life. Dr. Jones will share ways to re-energize, re-engage, and re-spark your inner drive, improve results and maximize productivity.

Closing Session • Friday, August 20

HEROES, VILLAINS AND DRUNK OLD MEN • LESSONS FOR YOUR CU JOURNEY

You're going eleven-billion miles an hour each day, leading and serving others like a pro while trying to listen well, fight fair, resolve conflicts, build relationships, and be unbelievably awesome. But how do you do all that? How can you keep everybody in your personal and professional lives happy while not completely burning yourself out? This session has the answers. It will share lessons from a former financial services executive, the most influential storytelling technique ever created, and a motley crew of (formerly) drunk old men. You'll leave with practical skills to help you build a credit union full of heroes, keep the villains at bay, and create a brighter future for everyone you serve.



Speaker: Andy Janning

Andy is a nationally recognized expert in leadership, communication, and organizational development. During his tenure at FORUM Credit Union, Andy led the creation of hundreds of new learning and organizational development programs to support FORUM's growth. Andy has earned national accolades for employee development excellence from *Training Magazine* and the American Society of Training and Development (ASTD). CUNA named him the national Training Professional of the Year, and *Training Magazine* called him one of the Top Trainers in the world under the age of 40. Andy uses his film-making skills to tell life-changing stories for the National Credit Union Foundation and his photo and film work has been seen around the world and featured by *National Geographic*.



EDUCATION SESSIONS

General Sessions

THRIVE: Turning Uncertainty into YOUR Competitive Advantage

Speaker: Meridith Elliott Powell • Thursday 10:30 A.M.

Competitive, challenging and constantly changing – that is today’s marketplace! To grow and compete you need a new perspective and a new approach to sales, marketing and business growth. This program is based on Meridith’s research of nine companies that are still thriving in business today. These businesses survived World Wars, economic depression, and even a pandemic. Her research revealed a powerful methodology for what it takes to navigate change at this level, to find opportunity in crisis, and how to move from reacting to change to driving it. In this session, Meridith Elliott Powell will share the innovative strategies your credit union needs to redefine disruption, put you in the driver’s seat, and turn uncertainty to your competitive advantage.

Who Comes Next: Succession Planning Made Easy

Speaker: Meridith Elliott Powell • Thursday 1:30 P.M.

Your competitive advantage comes down to the level of talent you attract. With more than 75-million baby-boomers reaching retirement age, you need to be prepared. You need answers to the important questions: *Who will take their place? Who will lead our organization? And who comes next?* Meridith Elliott Powell will share the proven strategies you need to build your leadership bench and design a succession plan that ensures the long-term growth of your credit union. She’ll share what it takes to build a strong talent pipeline, develop your future leaders, align your succession plan to your strategic objectives, and implement strategies to stay out of the urgent phase and into a culture of continuous leadership development.

The Ripple Effect of 2020

Speaker: Michael A. Petrone • Thursday 2:45 P.M.

The pandemic along with changing consumer, political, and socio-economic status has required change in many ways. For credit unions, the ripple effect of 2020 has brought on changes to business practices and should have you rethinking how to protect your people, assets, and reputation. This session will highlight some of the marketplace realities, changes and obstacles that are requiring your operational strategies and protection to be adjusted.

Speakers



Meridith Elliott Powell

Sales strategist, leadership expert, Certified Speaking Professional, and award-winning author, Meridith Elliott Powell wants today’s businesses to stop viewing uncertainty as something that prevents them from being successful. Her programs, leadership coaching, online courses, and keynote presentations leverage her 9 step formula for making uncertainty your company’s strategic advantage.™ With a background in corporate sales and leadership, her career

expands over several industries including banking, healthcare and finance. Meridith worked her way up from an entry-level position to earn her seat at the C-Suite table. Stop letting unpredictability be an obstacle to your success, and start embracing today’s uncertainty to drive your credit union’s growth.



Michael A. Petrone

Mike Petrone is a risk management consultant in Business Protection Risk Management for CUNA Mutual Group. In this role, he assists credit unions in identifying areas of risk in their operations and recommends appropriate controls to reduce loss exposures. Mike began his career with CUNA Mutual Group in 1986 as a loss prevention specialist. He was later promoted to risk management specialist and then to senior risk management specialist. Mike

has earned the designations of Certified Fraud Examiner (CFE), Certified Financial Services Auditor (CFSA) and Credit Union Security and Fraud Expert (CUSFE). Based in China, Maine, Petrone serves credit unions across the United States.



SILENT AUCTION

Thursday
9:00 A.M. to 3:30 P.M.

This auction is a huge success each year! Bid on items donated by credit unions and exhibitors with all proceeds to benefit

the Maine Credit Unions Campaign for Ending Hunger.

COMEDIAN JUSTON MCKINNEY Friday Breakfast Entertainment



Juston McKinney has three “Tonight Show” appearances and half a dozen shows on Comedy Central since turning in his York County Sheriff

Deputy’s badge. Consistently selling out theaters, Juston is at the top of his game. “Destined for stardom” was how *The New York Times* described him.

CONVENTION REGISTRATION FORM

CONVENTION FEES

Make check payable to:

Synergent
P.O. Box 1236
Portland, Maine 04104

Complete the Registration Form
and return to Member Services by
mail at the above PO Box or
e-mail to Susan Erlandson at
serlandson@mainecul.org.

**Registrations submitted electronically
will be billed in August.**

CANCELLATION POLICY

**No refund will be given after
June 18, 2021. If a refund is
necessary, please contact Linda
Scott or Susan Erlandson at the
League office prior to that date.**

Registration Form/Convention Pricing

2021 Maine Credit Union League Convention

In an effort to accommodate every credit union in the state, and giving consideration to the anticipated state limitations on in-person meetings, we are initially limiting in person attendance at the annual convention to **four participants per credit union on-site**. Space for additional registrants may become available as CDC/state guidelines change, or as we determine how many credit unions are sending people in person.

Please submit up to four registrants by **June 18**. After this date, any space available for more on-site registrations will be made available to credit unions on a first-come, first-served basis.

There is no limit for remote attendance. Log-on information and materials will be emailed a few days prior to the convention dates.

Fee: \$99 per person, on-site or remote. For those attending in person, please indicate meal attendance.

Credit Union _____

On-site Attendees (up to 4 prior to June 18)

1. Name _____

☐ Thursday Breakfast ☐ Thursday Lunch ☐ Friday Breakfast

Dietary Restrictions _____

2. Name _____

☐ Thursday Breakfast ☐ Thursday Lunch ☐ Friday Breakfast

Dietary Restrictions _____

3. Name _____

☐ Thursday Breakfast ☐ Thursday Lunch ☐ Friday Breakfast

Dietary Restrictions _____

4. Name _____

☐ Thursday Breakfast ☐ Thursday Lunch ☐ Friday Breakfast

Dietary Restrictions _____

Please contact me if additional on-site attendance registrations become available.

☐ Name _____

Remote Attendees

Name _____ Email _____

Name _____ Email _____

Name _____ Email _____

Name _____ Email _____

Number of Attendees x \$99 = Total _____

Please return completed form prior to June 18, 2021.

Remote attendees may be added anytime before convention. Please email Susan Erlandson at serlandson@mainecul.org.



Maine Credit Union League

HOTEL REGISTRATION FORM

In addition to rooms at the Holiday Inn, the following Old Port hotels are in close proximity and may have room availability during convention. *Hotels are busier in the summer months, so plan early.*

The Westin Portland Harborview

157 High Street, Portland (0.2 miles)
207.775.5411

Courtyard by Marriott Portland

321 Commerical Street, Portland (0.4 miles)
207.780.6000

Hampton Inn Downtown

209 Fore Street, Portland (0.6 miles)
207.775.1454

The Portland Harbor Hotel

468 Fore Street, Portland (0.4 miles)
207.775.9090

Hyatt Place Old Port

433 Fore Street, Portland (0.5 miles)
207.775.1000

The Portland Regency Hotel

20 Milk Street, Portland (0.6 miles)
207.774.4200

The Press Hotel

119 Exchange Street, Portland (0.5 miles)
207.808.8800

The list above is not a League endorsement of these hotels.

Each credit union may reserve up to two rooms at the Holiday Inn By The Bay on a first-come, first-serve basis. In order to reserve rooms, please fill out the registration card below and email, mail or fax to Member Services at 773-0957 by the **June 9 deadline**.

More rooms may be available after June 9. These may be reserved by calling 207.775.2311 after June 9. Please note that on **July 18** any available rooms will be released to the general public and rates may be subject to change.

CARD DEADLINE: JUNE 9, 2021

Hotel Registration Form: Holiday Inn by the Bay

2021 Maine Credit Union League Convention

Please reserve accommodations from the Holiday Inn group reservation block as follows. *Note: Limit two rooms per credit union. One registration per form.*

Credit Union _____

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

Single or Double: \$199.00 per night

**For Hotel
Use Only**

Arrival Date _____

Conf. #

Departure Date _____

Number in Room _____

Date Rec/Made

Person Sharing Room _____

Check-in time after 3:00 P.M. · Check-out time 11:00 A.M.

Cancellation policy: 48 hour notice, or full rate charged

Credit Card No. _____ Exp. _____

Credit Union must provide hotel with copy of tax exempt certificate. Please include a copy with this registration card.

Any cancellations made with less than 48 hours notice will be charged the full room rate.

Contact Linda Scott, Member Services, at the League office if you have any questions at 1-800-442-6715 or lscott@mainecul.org.



Maine Credit Union League

800.442.6715 MAINECUL.ORG