



2024 VOLUNTEERS' CONFERENCE

OCTOBER 25-26

SAMOSSET RESORT · ROCKPORT, MAINE



FRIDAY, OCTOBER 25

1:00 – 1:15 PM

WELCOME

Elise Baldacci, President, Maine Credit Union League

1:15 – 2:15 PM

NCUA SUPERVISORY PRIORITIES

John Kutchey, NCUA Eastern Regional Director

Mr. Kutchey will present updates from NCUA on the 2024 supervisory priorities and emerging risk trends impacting credit unions of all sizes. He will also provide a look into the possible trends and impact in 2025 as well.

2:30 – 3:30 PM

MARKETS, ECONOMY AND BALANCE SHEET UPDATE

Andrew Paolillo, Vice President, Director of Member Strategies & Solutions, FHLBank Boston

In this session, Mr. Paolillo will discuss key national and regional economic factors as well as capital market conditions that are most relevant to managing credit union balance sheets in these unique and challenging times. Additionally, he'll take a deep dive into call report trends to see how credit unions are navigating the ever-changing interest-rate environment, and strategies they are deploying to properly balance risk and return.

5:00 – 6:00 PM

SOCIAL HOUR AND HOST BAR · Knox County Ballroom

Please join us in extending a sincere thanks to the sponsors of the host bar:

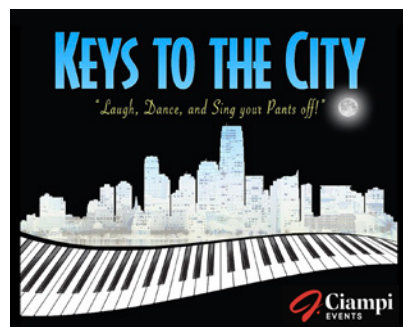


6:00 – 7:30 PM

DINNER · Knox County Ballroom

7:30 – 8:30 PM

ENTERTAINMENT: DUELING PIANOS · Knox County Ballroom



In keeping with the tradition of a dueling piano genre, *Keys to The City* is a request-based sing-along show featuring Seth Holbrook and Jim Ciampi that incorporates a great deal of audience participation and comedy. A high energy show filled with all the great hits of the decades, from Elton to Billy and Sinatra to Bruno.

Two guys, two pianos and two microphones can do a lot of damage! You'll be singing and laughing all night long.

SATURDAY, OCTOBER 26

7:00 – 9:00 AM **REGISTRATION**

7:30 – 9:00 AM **BREAKFAST** · State of Maine Hall

9:15 – 10:15 AM **CREDIT UNIONS AND THE INFINITE GAME**

Kevin Smith, Consultant, TEAM Resources

Too many people, particularly in corporations are playing finite games and playing to “win.” They’re doing this in a way that makes leaders do things that jeopardize the bigger picture health of their organizations. Author Simon Sinek asks us to consider the flipping of this mindset, and to think about playing an *Infinite Game*, where there is nothing to “win.” The goal is to keep playing; to identify a just cause worth working toward— one that ultimately cannot be achieved.

In this session we’ll explore how this applies to all credit union people: from volunteers to MSRs. Presenter Kevin Smith will explore how this flipped mindset works in lockstep with credit union principles and philosophy that is in our DNA and will help credit unions thrive for all of the tomorrows.

10:30 – 11:30 AM **NAVIGATING THE FUTURE: ECONOMIC INSIGHTS AND INDUSTRY BENCHMARKS**

Erin Coleman, AVP of Professional Services, Callahan & Associates

Context and perspective are deeply important components of effective governance in the Board room. In this session, we will provide an overview of the current macroeconomic climate focusing on those indicators that shape credit union strategies. We’ll look at financial performance trends across the credit union system to provide context around key trends and challenges. Finally, we will look at a *Response To Request For Proposal – Strategic Plan Consulting Services*, page 3: a comparative analysis of Maine credit unions compared to the nation, with a focus on relative strengths and potential areas of opportunity for the future.

11:30 AM – 1:00 PM **LUNCH** · State of Maine Hall

Provided for all conference registrants and registered guests

1:00 – 2:30 PM **BREAKOUT SESSIONS**

2:30 PM **ADJOURNMENT**

CONFERENCE SPEAKERS



ELISE BALDACCI

Elise Baldacci is President of the Maine Credit Union League. She is the first woman to be appointed by the Board to permanently serve the organization in this capacity. Baldacci joined the League from the office of Governor Janet T. Mills, where she served as Deputy Chief of Staff. Prior to her service in the Governor's office, she worked for both the League and Synergent in various roles and was a member of the Senior Leadership Team. Baldacci began her career at the League as the Director of Governmental Affairs and assumed additional management and oversight responsibilities throughout her tenure, serving as an Assistant Vice President; Vice President; and Senior Vice President – Policy.



JOHN KUTCHNEY

John Kutchney is the Regional Director for the NCUA's Eastern Region. As Regional Director, he oversees the examination and supervision of federally insured credit unions in Connecticut, Delaware, the District of Columbia, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont, Virginia, and West Virginia. Prior to his appointment as Regional Director, Mr. Kutchney served as the agency's Deputy Executive Director for the NCUA. Within the NCUA, he has also held positions as Deputy Director in the Office of Examination & Insurance, Director of Risk Management and then Region II's Director of Supervision. He also served as a Supervisory Examiner, a Problem Case Officer and a Principal Examiner. Prior to joining the agency, he worked for various credit unions.



KEVIN SMITH

Kevin Smith is Consultant and Publisher with TEAM Resources. He brings extensive experience in training, designing and implementing professional development resources to nourish the growth of leaders within the credit union industry. Kevin facilitates strategic planning processes, teaches Strategic Governance to Boards of Directors, and oversees the TEAM Resources board self-evaluation programs with credit unions nationwide. Previously, Kevin spent 10 years at the Credit Union National Association (CUNA), in the Center for Professional Development as Director of Volunteer Education. In that role Kevin developed and oversaw programs for credit union executives, boards, and volunteers. This included conferences and training events, webinars, print programs, and online courses, among others.



ANDREW PAOLILLO

As Director of Member Strategies & Solutions, Andrew leads the strategies team in creating and identifying customized funding strategies for members. Prior to joining the bank, Andrew was a Senior Portfolio Manager at a boutique investment advisory firm, with a focus on helping community depository institutions develop and execute upon asset-liability management (ALCO) strategies tailored to their needs. Before that, he began his career on the trading desk of a global investment bank. Passionate about understanding member balance sheets and identifying the solutions that can help them effectively manage return and risk, Andrew is a frequent contributor to the Strategies & Insights section of the FHLBank Boston website, producing articles, case studies and webinars related to balance sheet strategies, the markets, and the economy.



ERIN COLEMAN

Erin Coleman is Callahan & Associates' Associate Vice President for Professional Services. Her collaborative style and heart for service enables Erin to foster connections and build trust with credit union teams at all organizational levels. During almost 30 years of service in the credit union system, Erin has had the great fortune to work both inside and beside credit unions throughout North America and beyond. Erin established her reputation as a credit union champion during many years spent as a relationship manager at multiple technology providers. During her recent tenure at the Filene Research Institute, Erin honed her visibility as an effective facilitator, speaker, and instructor of programs that move words and ideas to action.