



JANUARY 19 - 22, 2022

BONUS SESSION JANUARY 18TH

FAIRMONT ORCHID – BIG ISLAND OF HAWAII

TUESDAY, JANUARY 18, 2022

Time	Session
7:30 – 8:30	Bonus Session Registration
	Bonus Sessions – Choose One
8:30 – 11:30	Audit/Supervisory Committee Workshop Julee Fox, Partner, BKD James L. This, PhD, President, James L. This and Associates
8:30 – 11:30	Viable Strategies: Five Steps to a Secure Future Richard Lum, CEO, Vision Foresight Strategy Tony Ferris, President & CEO, Rochdale Paragon Group Jeff Owen, COO, Rochdale Paragon Group
10:00 – 10:15	Morning Break
10:15 – 11:30	Bonus Sessions Continue
11:30	Networking Buffet Lunch (Bonus Session attendees)
4:00 – 6:00	Registration

WEDNESDAY, JANUARY 19, 2022

Time	Session
7:30 - 3:30	Registration
8:15 - 8:30	Welcome to Volunteer Leadership Institute <i>Tony Ferris, President & CEO, Rochdale Paragon Group</i> <i>James L. This, President, James L. This & Associates</i>
8:30 - 9:30	Keep on Pushin' <i>Devon Harris, Member Jamaican Bobsled Team</i>
9:30 - 9:45	Morning Break
9:45 - 10:45	Regulatory Update <i>Rodney Hood, Board Member, NCUA</i> <i>Brian Knight, Executive Vice President & General Counsel, NASCUS</i> <i>Dennis Tanimoto, President/CEO, Hawaii Credit Union League</i>
10:45 - 11:00	Morning Break
11:00 - 12:00	Building a Viable and Sustainable Future <i>Richard Lum, CEO, Vision Foresight Strateg</i> <i>Tony Ferris, President & CEO, Rochdale Paragon Group</i>
12:00 - 1:15	Lunch
1:15-2:15	Economic Outlook <i>Byron Gangnes, UHERO Senior Research Fellow and Professor Emeritus of Economics, University of Hawaii at Manoa</i>
2:15 - 2:30	Afternoon Break
2:30-3:30	The Use of Subordinated Debt for Credit Union Capital Management <i>Dennis Holthaus, Managing Director, Skyway Capital Markets</i>

THURSDAY, JANUARY 20, 2022

Time	Session
7:15 – 8:30	Buffet Breakfast
8:30-9:30	The Future of Mobility and How it Impacts Credit Union Lending <i>Tony Boutelle, President & CEO, CU Direct</i>
9:30 - 9:45	Morning Break
9:45-10:45	Building Diversity, Equity and Inclusion Effectively and Profitably <i>Ronaldo Hardy, Chief Diversity and Inclusion Officer & Owner, CU Strategic Planning</i>
10:45 - 11:00	Morning Break
11:00 - 12:00	I Wasn't Really Hacked – Was I? <i>Jim Stickle, CEO, Stickle on Security</i>
12:00 - 1:15	Lunch
1:15 - 2:15	Breakouts (Choose One)
	Me Worry? Public Deficits and Debt <i>Byron Gangnes – UHERO Senior Research Fellow and Professor Emeritus of Economics, University of Hawaii at Manoa</i>
	Regulatory and Accounting Changes That Will Impact Credit Unions <i>Julee Fox, Partner, BKD</i>
	The Acquisition of a Bank by a Credit Union <i>Dennis Holthaus, Managing Director, Skyway Capital Markets</i>
2:15 - 2:30	Afternoon Break
2:30 - 3:30	Breakouts (Choose One)
	Credit Union Advocacy Priorities <i>Dennis Tanimoto, President/CEO, Hawaii Credit Union League</i>
	Empowering Your Board and Committee Chairs <i>Matt Fullbrook, Manager of the David & Sharon Johnston Centre for Corporate Governance Innovation, Rotman School of Management</i>
	The Future of Payments in Financial Services <i>Nick Evens, President & CEO, Curql Collective</i>
6:00	Ohana Dinner <i>Invitation only for attendees who have come to five or more Hawaii Institutes</i>

FRIDAY, JANUARY 21, 2022

Time	Session
7:15 - 8:30	Buffet Breakfast
8:30 - 9:30	Board of the Future <i>Matt Fullbrook, Manager of the David & Sharon Johnston Centre for Corporate Governance Innovation, Rotman School of Management</i>
9:30 - 9:45	Morning Break
9:45 - 10:45	Drop your Tools: Shifting Battle Tactics in the War for Talent <i>Sekou Bermiss, Associate Professor of Strategy & Entrepreneurship, University of North Carolina, Chapel Hill</i>
10:45 - 11:00	Morning Break
11:00 - 12:00	FinTechs – Are They Here to Buy us Lunch or Eat our Lunch? <i>Nick Evens, President & CEO, Curql Collective</i>
12:00 - 1:15	Lunch
1:15-2:15	Making Lemonade: What COVID Taught Us About CU Resiliency <i>Alix Patterson, Chief Experience Officer, Callhan & Associates</i>
2:15 - 2:30	Afternoon Break
2:30 - 3:30	Asset Breakouts (Choose One)
	Assets under \$500 million
	Assets between \$500 million and \$1 billion
	Assets greater than \$1 billion
	Supervisory/Audit Committee
6:00	Dinner in Paradise

SATURDAY, JANUARY 22, 2022

Time	Session
7:15 – 8:30	Buffet Breakfast
8:30 – 10:00	Are We There Yet? Yes, and Faster Than You Think <i>Frank Diekmann, Publisher, CUToday.info</i>
10:00 - 10:15	Morning Break
10:15 - 11:30	The Aloha Way to Adapt to our New World <i>Ramsay Taum, Founder & President, Life enhancement Institute of the Pacific, LLC</i>
11:30	Institute Concludes