



VOLUNTEER LEADERSHIP INSTITUTE – HAWAII FACT SHEET

Introduction

Over the past twenty-two years, the Volunteer Leadership Institute – Hawaii has established itself as the premier training and networking event for credit union Directors, Supervisory Committee members and Senior Executives.

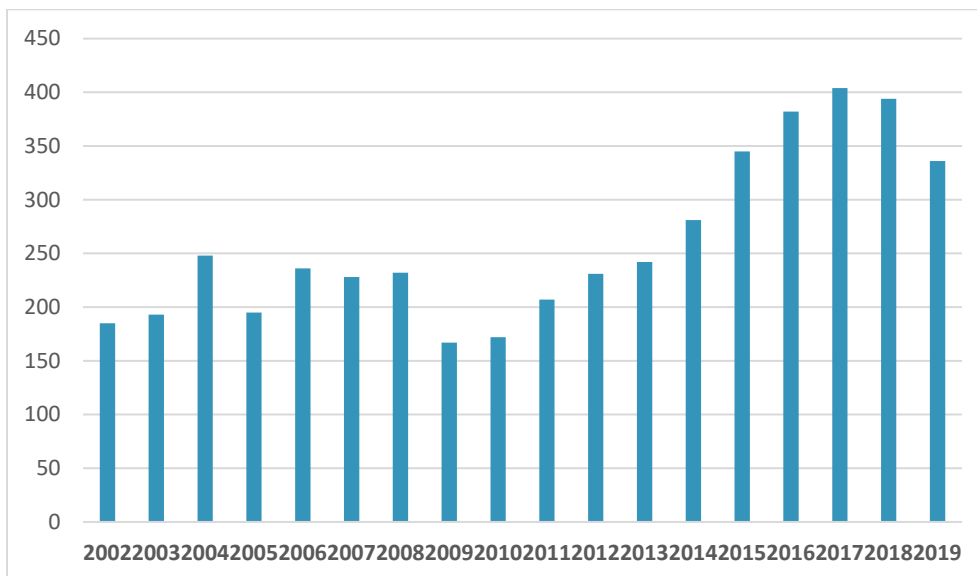
This proud tradition continues in 2020 from January 28th – February 1st at the beautiful Grand Hyatt Kauai Resort & Spa.

Nationally acclaimed speakers, shared best practices and insights into the future of the movement will ensure that your volunteers are prepared for the exciting times ahead.

We encourage you to involve as many of your volunteers and executive team members as possible so they can share the same information, discuss insights together, create long-lasting peer relationships and commit to taking action.

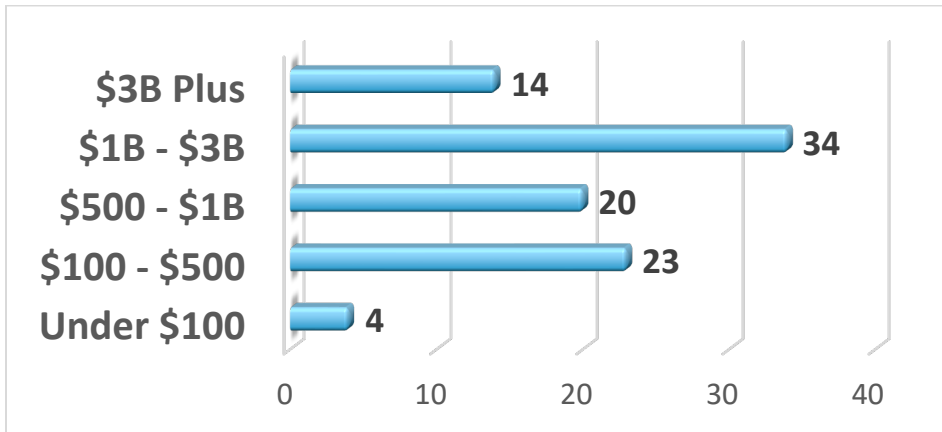
2019 Institute Demographics

Attendance History



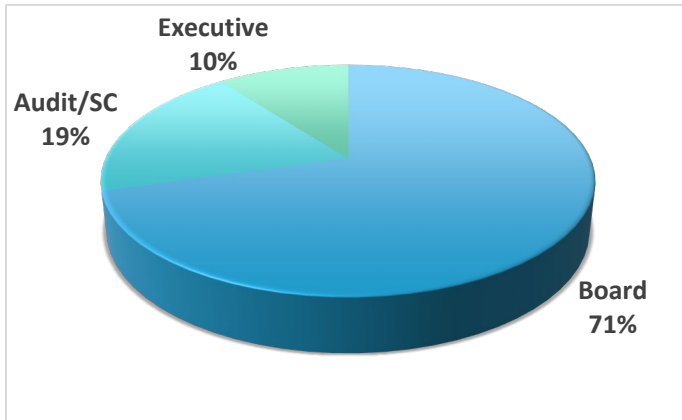
Note: 2019 attendance affected by concerns of volcanic activity on the Big Island.

Asset Size of Credit Unions Attending

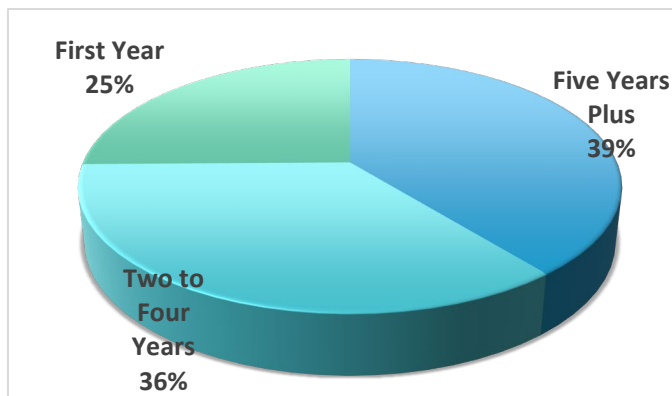


95 different credit unions

Position in the Credit Union



Number of Times Attending Volunteer Leadership Institute - Hawaii



39% of the attendees have come to five or more Institutes

Commitment to Training

The Volunteer Leadership Institute - Hawaii is not a junket. Unlike some conferences that meet in the morning and then adjourn for play, the Institute schedules a full day of significant educational programs (the 2019 agenda is attached).

We are proud of the attendance record of our participants - people respect the investment from their credit union and take their commitment seriously.

2019 session averages were as follows:

- Mainstage sessions 86%
- Breakout Sessions 80%

Nationally Acclaimed Speakers

The Volunteer Leadership Institute attracts top-tier speakers from regulators, trade associations and industry professionals. In the 2019 agenda (attached) you will see programs led by the following:

- NCUA Board Member Rick Metsger
- NASCUS President/CEO Lucy Ito
- CUNA President/CEO James Nussle
- Hawaii Credit Union League Dennis Tanimoto
- Industry Professionals
 - Jeff Owen, COO, Rochdale Paragon Group
 - Tony Ferris, President & CEO, Rochdale Paragon Group
 - James L. This, PhD, President & CEO, James L. This and Associates
 - Rudy Hanley, President & CEO - Retired, SchoolsFirst Federal Credit Union
 - Andrew Downin, Vice President, Marketing & Communications, Vantage West Credit Union
 - Will Rance, Vice President, Community Relations, Washington State Employees Credit Union
 - Karen Sprenger, Chief Operating Officer, LMG Security
 - Gordon J. Dobner, CPA, Partner, BKD, LLP
 - Byron Gangnes, Professor, University of Hawaii at Manoa
 - Michael Bell, Attorney & Counselor, Howard & Howard, Law for Business
 - Maria Martinez, President & CEO, Border Federal Credit Union

Investment Value

The Volunteer Institute – Hawaii includes several things in the registration fee that others do not:

- Full buffet breakfasts on three days

- Plated lunches on three days
- Dinner in Paradise – with entertainment on Friday night

The Institute also offer discounts on the registration fee for the following:

- Early-bird registration – prior to October 1st
- Complimentary seventh registration when a credit union register six people

Praise from Our Attendees

Volunteers

Knowledge is power and this is the place to be to get well rounded classes that educate and most importantly engage you, to go home with energy and enthusiasm. This conference is incredibly enjoyable thanks to the presenters and the materials presented. I always enjoy the networking this conference provides, you can hear from peers larger and smaller than your credit union.

Gayla Gjertsen, Board Member, TwinStar Credit Union

I enjoy attending VLI and find it very beneficial to my role as a credit union director. The program is always top notch; attracting nationally-known speakers from the NCUA, CUNA etc. It provides a good mix of updates/strategies on current credit union industry issues and refreshers on important topics like governance and executive compensation. I especially enjoy the annual economic update/outlook provided by a local economics professor. VLI is a great program for both seasoned directors and newcomers alike. I highly recommend attendance for both board and supervisory committee members.

Joe Towslee, Board Member, Credit Union 1

After retiring from a career in Credit Unions, I am now a Credit Union volunteer. I've attended the VLI conference several years and I am pleased to say, this conference is unlike any I attended throughout my 35-year career. VLI provides a full day of learning and remaining relevant on the Credit Union movement. Sessions begin promptly as scheduled and end on time each afternoon. This means a full day of new information, networking and hearing from top notch speakers. I highly recommend VLI. It is one conference that truly delivers all and perhaps more than promised in the brochures.

Earlene Fantz, Audit Committee Chair, evergreenDIRECT Credit Union

VLI hosts the most professional, well planned credit union conferences. Top notch speakers, very detail oriented AND fun, too. I don't miss any session; they are all so worthwhile from first thing in the morning thru the ending sessions in the afternoons.

Pam Ayres, Board Member, Veridian Credit Union

Presidents/CEOs

Today, our financial world is complex enough as it is. For a credit union and its CEO to be successful, it needs a Board that is educated and understand today's many challenges. I cannot think of a better place for volunteers to gain the necessary knowledge and to network with their peers than Rochdale Paragon Group's Volunteer Leadership Institute. VLI provides the venue for a comprehensive curriculum that addresses the many strategic and operational aspects of a credit union.

Eddie Young, President/CEO, San Francisco Police CU

I have been in the credit union industry for over 40 years, and I truly believe that the Volunteer Leadership Institute (VLI) is the best conference available for both Volunteers and Senior Management. VLI puts together a terrific lineup of very pertinent and highly sought-after credit union professionals who are focused on the most current topics. As a CEO, I came away from the conference with a variety of tools and exceptional contacts. In today's environment with the Regulators requiring more education for Volunteers and staff, I believe VLI offers the most well-rounded conference available to credit union professionals.

Mark Morrison, President/CEO, MountainCrest CU

Absolutely the best volunteer conference available. Nowhere else can your volunteers go and hear from the head of CUNA, NCUA Board Members, Economic forecasts and the latest updates on regulatory issues, compliance, succession planning, and meet with industry leaders on topics that are relevant and customized just for them.

Jeff Kennedy, President/CEO, TwinStar Credit Union

I have been attending the VLI Conference for several years. Where else can you go where you can interact with the top regulators from both NCUA and State Regulators as well as listening and interacting with top speakers discussing our most pressing issues along with the newest innovations coming to our industry? The session in 2019 on how Credit Union are now able to purchase banks was the best I've been to in many years. I'm looking forward to attending again in 2020, and invite you to join me in beautiful Kauai, Hawaii.

Kurt Thelen, President/CEO, Campco FCU

I have attended the Volunteer Leadership Institute (VLI) for that past nine years. I always come away with something I did not know before attending. I find the sessions relevant and the information timely to the credit union industry. The Board and Supervisory Committee that attend with me always come away with positive comments. I would recommend the VLI conference to any CEO, Board and/or Supervisory Committee member.

Steve Kenny, President/CEO, Columbia Credit Union

Credit Union 1 Directors and CEO have been attending The Volunteer Leadership Institute – Hawaii for many years now. It is an excellent choice for volunteer training and networking. Each day is packed with informative and challenging programs from regulators, industry leaders and nationally recognized speakers. The full day sessions ensure that attendees learn a lot and that our credit union gets maximum value from its investment.

James Wileman, President/CEO Credit Union 1

Volunteer Leadership Institute – Hawaii: 2019 Agenda

Tuesday: Optional Half Day Bonus Session

Time	Event
	Bonus Sessions (Choose One)
8:30 – 11:30	The Board and Supervisory Committee Dilemma Jeff Owen, COO, Rochdale Paragon Group Tony Ferris, President & CEO, Rochdale Paragon Group
8:30 – 11:30	Executive Retention & Retirement Planning James L. This, PhD, President & CEO, James L. This and Associates
11:30	Buffet Lunch (Bonus Session attendees)

Wednesday

Time	Event
8:30-8:45	Welcome to VLI-Hawaii Tony Ferris, President & CEO, Rochdale Paragon Group James L. This, PhD, President & CEO, James L. This and Associates
8:45-10:00	Putting Purpose Ahead of Goals Rudy Hanley, President & CEO - Retired, SchoolsFirst Federal Credit Union
10:00-10:15	Morning Break
10:15-11:30	Regulatory Update Rick Metsger, Board Member, National Credit Union Administration Lucy Ito, President & CEO, National Association of State Credit Union Supervisors
11:30-12:45	Lunch
12:45-2:00	Mission Or Mirage? The Future Of PFI Andrew Downin, Vice President, Marketing & Communications Vantage West Credit Union
2:00-2:15	Afternoon Break
2:15-3:30	Breakouts (Choose One)
	Easy Does It: How Streamlining Processes Encourages Member Loyalty Andrew Downin, Vice President, Marketing & Communications Vantage West Credit Union
	Reality Fair – An Interactive Financial Awareness Activity Will Rance, Vice President, Community Relations Washington State Employees Credit Union
	Volunteer Essentials Refresher – Part 1 James L. This, PhD, President & CEO, James L. This and Associates Dennis Tanimoto, President & CEO, Hawaii Credit Union League Lucy Ito, President & CEO, National Association of State Credit Union Supervisors

Thursday

Time	Event
8:30 – 10:00	Cybercrime: Top Threats for 2019 <i>Karen Sprenger, Chief Operating Officer, LMG Security</i>
10:00 - 10:15	Morning Break
10:15 – 11:30	Accounting Standards Update <i>Gordon J. Dobner, CPA, Partner, BKD, LLP</i>
11:30 – 12:45	Lunch
12:45-2:00	Breakouts (Choose One)
	Cryptocurrency and Cybercrime <i>Karen Sprenger, Chief Operating Officer, LMG Security</i>
	Supervisory Committee's Role in CECL <i>Gordon J. Dobner, CPA, Partner, BKD, LLP</i>
	Volunteer Essentials Refresher – Part 2 <i>James L. This, PhD, President & CEO, James L. This and Associates</i> <i>Dennis Tanimoto, President & CEO, Hawaii Credit Union League</i> <i>Lucy Ito, President & CEO, National Association of State Credit Union Supervisors</i>
2:00-2:15	Afternoon Break
2:15-3:30	Asset Breakouts (Choose One)
	Under \$500 million
	\$500 million - \$1 billion
	Over \$1 billion
	Supervisory Committee
	CEOs and Board Chairs

Friday

Time	Event
8:30-10:00	Economic Update <i>Byron Gangnes, Professor, University of Hawaii at Manoa</i>
10:00-10:15	Morning Break
10:15-11:30	You Can Buy More Than You Realize <i>Michael Bell, Attorney & Counselor, Howard & Howard, Law for Business</i>
11:30 – 12:45	Lunch
12:45-2:00	CUNA: Champion of America's Credit Unions <i>James Nussle, President & CEO, Credit Union National Association</i>
2:00-2:15	Afternoon Break
2:15-3:30	Breakouts (Choose One)
	Inequality: Why Should We Care? <i>Byron Gangnes, Professor, University of Hawaii at Manoa</i>
	An Autopsy of Credit Union Mergers <i>Michael Bell, Attorney & Counselor, Howard & Howard, Law for Business</i>
	CUNA's 360-degree Advocacy <i>Trey Hawkins, Deputy Chief Advocacy Officer, Credit Union National Administration</i>
5:30	Dinner in Paradise

Saturday

Time	Event
8:30 – 10:00	Embracing the Underserved, A Credit Union's Approach <i>Maria Martinez, President & CEO, Border Federal Credit Union</i>
10:00 – 10:15	Morning Break
10:15 – 11:30	MORPH... Accepting, Embracing and Managing Change <i>Mark Mayfield, President, Mayfield Presentations</i>
11:30	Institute Concludes