

Opportunities  
to move  
you and  
your credit  
union  
forward



# CUNA Volunteer Institute

October 10-13, 2010

Las Vegas, NV



***NEW CEO offer inside!***

CUNA VOLUNTEER  
CERTIFICATION  
PROGRAM.



CUNA  
Credit Union  
National Association



Your Trusted Resource for Credit Union Success™

Professional  
Development

Visit [training.cuna.org](http://training.cuna.org)  
and choose *Schools & Conferences.*

# Make great strides



The CUNA Volunteer Institute will help you stay on top of all of the relevant issues, and inspire you along the way. Prove that you are taking the necessary steps to ensure that you're qualified to run a highly complex financial institution. By successfully completing identified sessions and exams, you can earn credits for the CUNA Volunteer Certification Program to work toward your Certified Credit Union Volunteer (CCUV) designation. Attend and make great strides!

## CUNA Volunteer Institute

October 10-13, 2010

Henderson, NV • Green Valley Ranch

(Just 7 miles from Las Vegas strip)

Tuition: \$1,295 (\$1,395 after August 29, 2010)

Visit [training.cuna.org](http://training.cuna.org) and choose *Schools & Conferences*.

**We're here to help!**

CUNA offers the board training necessary to fulfill proposed NCUA requirements issued in the recent comment letter. Get the latest information at [training.cuna.org/boardreq](http://training.cuna.org/boardreq)

## Pre-Conference Workshops

Pre-Conference Workshop Registration:  
8:30 – 9:00 a.m. • Sunday, October 10

Pre-Conference Workshops:  
9:00 a.m. – 1:00 p.m. • Sunday, October 10  
Tuition: \$375 each

### 1. Compliance Fundamentals Workshop

*Robert Rutkowski, Managing Partner, Weltman, Weinberg & Reis Co., L.P.A. (Board Track: Level 2, 6 credits, Safety & Soundness Category)*

Keeping up-to-date with key compliance topics will help you maintain your board's course and progress. If the buck stops with the board, then awareness of compliance issues must start there.

### 2. Board Fundamentals Workshop: Duties, Responsibilities & More

*Tim Harrington, CPA, President, T.E.A.M. Resources (Board Track: Level 2, 6 credits (2, Safety & Soundness; 2, Governance; 2, CEO Oversight Category))*

Attend and cover an overview of board responsibilities, basic duties, and liabilities. You'll discuss the concept of effective governance and make sure that you understand what the expectations are of a competent, engaged credit union leader.



## **New this year – for CEOs!**

### CEO Breakfast Roundtable

7:00 – 8:15 a.m.

Monday, October 11

*Tim Harrington, CPA, President, T.E.A.M. Resources*

Join your colleagues for an opportunity to network and share insights and issues at the CEO breakfast roundtable. This session will be moderated by Tim Harrington, an industry expert who can offer his insights into current issues and opportunities. Attend all of the sessions with your board, or split up and cover more ground. **CEOs attending with at least one board member can register for the full conference at ½ price!**

# Sessions include

Visit [training.cuna.org](http://training.cuna.org)  
and choose *Schools & Conferences*.

- Conference Registration: 11:00 a.m. – 12:30 p.m. and 4:00 – 5:30 p.m., Sunday, October 10
- Conference adjourns at 11:30 a.m., Wednesday, October 13

## **Rekindle the Fire When You Are Down to a Pilot Light**

Jack McCall, Founder, Jack McCall, Inc.

## **Social Media 101 for Credit Union Volunteers**

Christopher Morris, Manager of Communications & Web Resources, CUNA Councils

(3 credits, Level 2, Strategic Planning Category)

## **Social Media 101 Hands-on Workshop**

*(space will be limited for this session)*

Christopher Morris, Manager of Communications & Web Resources, CUNA Councils

## **Due Diligence & Ongoing Third Party Oversight**

Dan Johnson, CPA, Shareholder, Kirkland, Russ, Murphy & Tapp, P.A. & Steve Miller, CPA, Director/Senior Analyst, Goldstein Schechter Koch

(3 credits, Level 2, Safety & Soundness Category)

## **Compliance Update**

Robert Rutkowski, Managing Partner, Weltman, Weinberg & Reis Co., L.P.A.

## **Analyzing the Risk in Your Loan Portfolio**

Dan Jonson, CPA, Shareholder, Kirkland, Russ, Murphy & Tapp, P.A. & Steve Miller, CPA, Director/Senior Analyst, Goldstein Schechter Koch

(3 credits, Level 2, Safety & Soundness Category)

## **Leadership Lessons from Jimmy Stewart? You've Got to Be Kidding!**

Tim Harrington, CPA, President, T.E.A.M. Resources

## **E-governance: Using Online Tools to Build Your Board's Effectiveness**

Dottie Schindlinger, Vice President of E-governance, BoardEffect, Inc.

(3 credits, Level 2, Governance Category)

## **Implementing E-governance Successfully**

Dottie Schindlinger, Vice President of E-governance, BoardEffect, Inc.

(3 credits, Level 2, Governance Category)

## **Taming the Troublesome Board Member**

Katha Kissman, Senior Governance Consultant, BoardSource

(3 credits, Level 2, Board Operations & Development Category)

## **The Board Building Cycle: Nine Steps to Finding, Recruiting & Engaging Board Members**

Katha Kissman, Senior Governance Consultant, BoardSource

(3 credits, Level 2, Board Operations & Development Category)

## **How Two Credit Unions Grew by Serving the Hispanic Market**

Warren Morrow, CEO and Founder, Coopera Consulting & Greg Aguilar III, Community Development Coordinator, Ascentra Credit Union

## **CUSOs, Right & Wrong: From the Board's Perspective**

Bill Arensdorf, Board Member & Rob Joiner, Board Member

(3 credits, Level 2, Strategic Planning Category)

## **High Board Involvement = Great Results: The Board's Role in Strategic Planning**

John Redding, Founder and President, Institute for Strategic Learning, LLC

(3 credits, Level 2, Strategic Planning Category)

## **The Dynamic Board Policy Manual: Collaborating with Management, Setting Policies & Managing Operations**


Bill Arensdorf, Board Member & Rob Joiner, Board Member

(3 credits, Level 2, Governance Category)

## **More Than Great Service: Achieving a Lasting Competitive Edge**

John Redding, Founder & President, Institute for Strategic Learning, LLC

(3 credits, Level 2, Strategic Planning Category)

Sessions marked with this symbol  can earn you credit toward the Certified Credit Union Volunteer (CCUV) designation through the CUNA Volunteer Certification Program.

**CUNA VOLUNTEER**  
CERTIFICATION  
PROGRAM.

Schedule and speakers are subject to change. View the complete schedule online.

# Location

## GREEN VALLEY RANCH RESORT, SPA & CASINO

*(Just 7 miles from Las Vegas strip)*

2300 Paseo Verde Parkway

Henderson, NV 89052

Phone: 702-617-7777

Fax: 702-617-7778

Reservations: 866-782-9487

Room Rates:

\$120 single/double\*

**Hotel Reservation Deadline:  
September 24, 2010**

*\* Room rates and availability cannot be guaranteed. Rooms may be sold out prior to this date, so make your hotel reservations early! Room reservations and fees are the responsibility of the registrant. To claim this room rate, call for reservations and reference "CUNA" or "Credit Union National Association."*

## Bring a guest for just \$425!

Share sunny Nevada with your family! Guest registration includes:

- Breakfast – Monday, Tuesday, and Wednesday
- Lunch – Monday and Tuesday
- Reception – Tuesday evening
- Hoover Dam Discovery Tour and Springs Preserve Gardens Tour



## Nevada Optional Tours



### Hoover Dam Discovery Tour

*(Included for Attendees & Registered Guests)*

Sunday, October 10  
2:00 – 6:00 p.m.

Tour the depths of this mighty wonder. A professional guide will take you through the inside of the dam and explain how it was built and how the dam provides services today. In addition, you'll experience a breath-taking view of the dam and the Black Canyon below, where the mighty Colorado River starts its journey.

### Springs Preserve Gardens Tour

*(Included for Registered Guests)*

Tuesday, October 12  
10:00 a.m. – 2:00 p.m.  
*(includes lunch)*

Enjoy a relaxing stroll through our desert oasis, explore new possibilities in our enabling garden, and discover how to make the desert bloom through interactive exhibits.

*Space is limited for both tours. Reserve your seat soon. No refunds for tours.*

Visit [training.cuna.org](http://training.cuna.org) and choose *Schools & Conferences*.

# Registration form

Please complete one form per registrant. Type or print all information.  
Photocopy for multiple registrations.

## ATTENDEE INFORMATION

Legal name \_\_\_\_\_  Mr.  Mrs.  Ms.

Name preferred on badge \_\_\_\_\_

Title \_\_\_\_\_

Where would you like information mailed to?  CU  Home

CU name \_\_\_\_\_

CU mailing address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

CU phone number ( \_\_\_\_\_ ) \_\_\_\_\_ CU fax number ( \_\_\_\_\_ ) \_\_\_\_\_

E-mail address (required) \_\_\_\_\_

(Important confirmation information and program information will be sent electronically.)

## IN CASE OF EMERGENCY, PLEASE CONTACT (REQUIRED):

Contact name (day) \_\_\_\_\_ Phone ( \_\_\_\_\_ ) \_\_\_\_\_

Contact name (night) \_\_\_\_\_ Phone ( \_\_\_\_\_ ) \_\_\_\_\_

Completion of this form shall signify authorization of CUNA to assist the registrant in emergency situations and to use the information contained on the form, or otherwise provided by registrant in such situations.

Check here if you have any disability that requires special services.

## GUEST INFORMATION (Complete only if purchasing Adult Guest Pass.)

Guest name \_\_\_\_\_

Guest name preferred on badge \_\_\_\_\_

## CUNA VOLUNTEER INSTITUTE

Registration Fee: before August 29, 2010 \$1,295 \$ \_\_\_\_\_

after August 29, 2010 \$1,395 \$ \_\_\_\_\_

Pre-Conference Workshop: Compliance (VLW1NV10) \$375 \$ \_\_\_\_\_

Pre-Conference Workshop: Board Duties (VLW2NV10) \$375 \$ \_\_\_\_\_

Guest Program (VLGNV10) \$425 \$ \_\_\_\_\_

Hoover Dam Discovery Tour (Available to attendees and registered guests.) Attendee N/C \_\_\_\_\_

Guest N/C \_\_\_\_\_

Springs Preserve Gardens Tour (Available to registered guests only.) Guest N/C \_\_\_\_\_

### Available Discounts – Choose One:

CEO Registration Discount (10CVCEO) (50% off) (\$ \_\_\_\_\_ )

Past Participant Discount (CVIPP) (\$50/person) (\$ \_\_\_\_\_ )

CU Sending Two-Five Attendees (\$50/person) (\$ \_\_\_\_\_ )

CU Sending Six or More Attendees (\$100/person) (\$ \_\_\_\_\_ )

Total Enclosed \$ \_\_\_\_\_

## PAYMENT METHOD (Payment must accompany registration form.)

Check/share draft enclosed (Payable to Credit Union National Association, Inc.)

Charge my credit card (Fax to 608-231-4327)

Charge \$ \_\_\_\_\_ to my  VISA®  MasterCard®

Card account number \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Expiration date \_\_\_\_\_

Print name as it appears on card \_\_\_\_\_

Signature \_\_\_\_\_

CUNA/League Affiliated? (Please note: Affiliation with CUNA/League is required for attendance.)

Yes  No

If you do not receive confirmation within two weeks of registration, please call 800-356-9655, ext. 4400.



### FOR OFFICE USE ONLY:

Customer # \_\_\_\_\_

Parent # \_\_\_\_\_

Authorization \_\_\_\_\_

Order # \_\_\_\_\_

Confirm Date \_\_\_\_\_

## FOR MORE INFORMATION

### PROGRAM CONTENT:

E-mail: training@cuna.coop

Call: 800-356-9655, ext. 4249

### REGISTRATION INFORMATION:

E-mail: reginfo@cuna.coop

Call: 800-356-9655, ext. 4400

### CANCELLATIONS & REFUNDS

Cancellations received in writing (via fax 608-231-4327) seven or more days before the start of the program are eligible for a refund of the amount paid minus a \$200 administrative fee. No refunds will be granted if the cancellation is received six days or less before a program begins. Substitutions are accepted anytime prior to the start of the program at no additional cost. Simply fax an updated registration form to 608-231-4327, listing the new participant and who they will be replacing.

### FAX:

608-231-4327

### MAIL:

Credit Union National Association

P.O. Box 78546

Milwaukee, WI 53278-0546

### WEB:

[training.cuna.org](http://training.cuna.org)

Please be advised that Credit Union National Association reserves the right to photograph any and all program attendees and guests during program activities and meetings and reprint such photographs, in whole or in part, for future CUNA promotional uses.



PO Box 431 | Madison, WI 53701-0431



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