Generation NEXT
Credit Unions and GEN Y

Southern California Credit Union Alliance
2015 Conference and Golf Event
2015 Conference & Golf Event
June 15 & 16, 2015

Pacific Palms Resort and Conference Center
One Industry Hills Parkway, City of Industry, CA 91744
www.PacificPalmsResort.com

WHO SHOULD ATTEND:
Credit Union Executives, Management Team Members, Volunteers,
Future Leaders and Business Partners.
Space is limited. Register today at www.sccua.org

STANDARD REGISTRATION:
Registration Cost: $500
Includes a 2 day pass to the conference, all conference materials and meals.
Super-size your registration and add Golf or Spa for $100.2

FUTURE LEADER PACKAGE:
Registration Cost: $3501
Includes a 2 day pass to the conference, all conference materials and meals.
Super-size your registration and add Golf or Spa for $50.2

VOLUNTEER BREAKOUT 1 DAY SPECIAL:
Registration Cost: $200
Includes a 1 day pass to the conference on Monday, a special Volunteer Breakout Session, all conference materials and meals.

Cancellation Policy: You must notify us of your cancellation 30 days prior to the date of the event to receive a full refund. Cancellations made up to 15 days before the date of the event will be subject to a charge of 50% of the Registration or Sponsorship cost. Cancellations made within 15 days of the event will be subject to a 100% charge of the Registration or Sponsorship cost.

For information about the Conference or Sponsorship Opportunities, please contact:
SCCUA Director: Robert York • ryor@ilwucu.org • 866.445.9828 xt. 238
SCCUA Administrator: Erica Stuppa • erica.sccua@calcomcu.org • 310.371.4242 xt. 218

1 A Future Leader is a natural person credit union employee under the age of 40 at the time of registration. 2 The “Super-size” package includes your choice of a spot in the SCCUA Golf Classic OR $100 in credit toward a treatment at the Pacific Palms Day Spa. Prior reservations are required for the Day Spa treatments.
2015 Conference & Golf Event
Keynote Speakers

**Eric Chester - Opening Keynote Speaker**
“GEN Y the Emerging Generation”

Eric Chester is the premier expert on the emerging workforce. He began his career as a high school business teacher and coach. After six years in the classroom, Eric launched out as a motivational speaker for students, and in the decade that followed, he became one of America’s top speakers for youth visiting hundreds of schools throughout the US and Canada and inspiring millions of high school and college students to reach higher and work harder.

Leading companies and organizations soon discovered that Eric had “cracked the code” on the emerging generation and sought out Eric’s advice on how they could better engage the under 30 workforce. With his engaging, often irreverent style, he quickly became a favorite keynote speaker for corporate meetings and events.

Since 1998, Eric Chester has been the leading voice in recruiting, training, managing, motivating, and retaining young talent. More than 200 clients including 7-Eleven, McDonald’s, Wells Fargo, Harley-Davidson, Allstate, ServiceMaster, and Alcoa, have turned to Eric to help them better understand and engage their emerging workforce.

Chester is also the Founder of The Center for Work Ethic Development, a firm offering cutting-edge curriculum and online training resources for leaders, high school and college students, workforce training centers, and all levels of employees.

With a diminishing work ethic being a primary concern for today’s employers, Eric frequently appears on national media to provide insight and perspective to business leaders, educators, and concerned adults. He’s the author of the business books Employing Generation Why (Tucker House Books) and Getting Them to Give a Damn (Kaplan). His 2012 release, Reviving Work Ethic – A Leader’s Guide to Ending Entitlement and Restoring Pride in the Workforce – is the first business book on work ethic since 1904.


**Dr. Natalie Stavas - Closing Keynote Speaker**
“Your Defining Moment”

Dr. Natalie Stavas is a physician at Boston Children’s Hospital. She specializes in work with teenage mothers, improving the health of vulnerable children and decreasing youth violence. Described as a healer, educator and Boston community leader she received the 2012 Change Maker award from The Boston Foundation.

On April 15, 2013 Dr. Stavas approached the finish line of her fifth Boston marathon. Just blocks away, she heard explosions and ran towards them. Arriving at the scene she went to work administering CPR, applying tourniquets and triaging the wounded.

Following these actions President Barack Obama, Katie Couric, and Anderson Cooper honored her for actions. Improper Bostonian magazine named Dr. Stavas one of “Boston’s Best” and The Boston Globe awarded her with “2013 Bostonian of the Year” - an honor bestowed upon those that shape the biggest story of the year in a remarkable way.

After the bombings Dr. Stavas increased her efforts in preventing childhood violence. She became a weekly medical contributor for Boston’s Fox 25- discussing issues affecting children and young adults, a mentor for Sole Train- a non-profit guiding inner-city youth on a path towards their full potential through running. In early 2014 she helped partner Prescription for the Outdoors with Boston Medical Center’s pediatric team.

This advocacy goes beyond borders- traveling to Haiti throughout the year Dr. Stavas provides medical care to children and helps strengthen the fragile medical infrastructure. A documentary featuring this work as a medical pioneer premiered at the 2014 South by Southwest film festival.

2015 Conference & Golf Event Speakers

John MacAllister, Principal, Dorado Industries
Session Speaker “The Future of Digital Payments”

John MacAllister is the former President of Benton International Inc. and Managing Partner for Benton Consulting Partners. His no nonsense approach to cost-effective consulting sets the tone for the solutions oriented advisory services offered by Dorado Industries.

Dorado Industries focuses on Consulting and Solutions Services. They deliver the combined skills of consultants with experience in the financial services, payment systems and the travel and leisure industries to bring hands-on experience, advisory services and practical know-how to clients.

Gene O’Rourke, Managing Director, O’Rourke & Associates
Volunteer Breakout Session Speaker “Is your next CEO hiding in plain sight?”

Gene, the Managing Director of O’Rourke, has over 40 years of recruiting, auditing and consulting experience. Thirty-five of those years had been devoted to credit unions, banks, insurance companies, and other financial institutions providing recruiting, auditing and financial consulting services such as asset/liability management, mergers, executive search, and strategic planning to many of the largest credit unions in the country. Retirement planning for senior executives, succession planning for credit unions. Credit union corporate governance, and credit union taxation issues – particularly Unrelated Business Income – are emerging areas that Gene has been focusing upon recently.

Randy Shultz, VP Marketing, Weber Marketing Group
Neil Goldman, Senior Partner GCS, Inc.
Session Speakers “Fruitcake, Vinyl Records & Generation Next”

What do they all have in common? Find answers to this and your other burning questions on how to attract the much-coveted Gen Next target audience during this session.

Join Dr. Neil Goldman, of Goldman Consulting & Strategies, & Randy Shultz, VP Marketing at Weber Marketing Group, for an interactive session full of thought-challenging exercises and lively discussions about your own credit union’s perceptions of this (rapidly) emerging target audience and discover just how relevant they believe YOU are in THEIR lives.

Tansley Stearns, Chief Impact Officer, Filene Research Institute
Danielle Brehmer, VP of Strategic Innovation, Marketing & Public Affairs Lake Trust CU
Session Speakers “Innovation in the Credit Union Industry”

Through their i³ Program the Filene Reserach Institute works hard to promote innovation in the Credit Union Industry. The founding principles of i³ (Ideas, Innovation, Implementation) have led to more than 150 concepts being created since the program’s inception in 2004. These product, service, and business model innovations help credit unions build operational efficiency, generate loans, mobilize savings, reach communities, and strengthen membership. Tansley Stearns will talk about the genesis and evolution of i³ while Danielle Brehmer will discuss how innovation has changed her Credit Union.

CEO PANEL

Panelists:
Bill Cheney, President/CEO of SchoolsFirst FCU
Carrie Birkhofer, President/CEO of Bay FCU
Brett Martinez, President/CEO of Redwood CU

Moderator:
Bill Birnie, President/CEO of Eagle Community CU
**Monday, June 15, 2015**

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<td>8:00 - 9:00</td>
<td>Conference Registration &amp; Reception with Continental Breakfast</td>
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<td>9:00 - 9:30</td>
<td>Welcome &amp; Announcements</td>
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| 9:30 - 10:45 | **Keynote Address – “GEN Y the Emerging Generation”**  
|             | Eric Chester, Motivational Speaker, Author                           |
| 10:45 - 11:00 | Break & Networking                                                    |
| 11:00 - 12:15 | **“The Future of Digital Payments”**  
|             | John McAllister, Principal, Dorado Industries                         |
| 12:15 - 1:30 | Lunch & Networking at the SCCUA Partner Pavilion                     |
| 1:30 - 2:45 | **VOLUNTEER BREAKOUT - Succession Planning**  
|             | Gene O’Rourke, Managing Director, O’Rourke & Associates              |
| 1:30 - 2:45 | **“Fruitcake, Vinyl Records & Generation Next”**  
|             | Randy Shultz, VP Marketing, Weber & Associates  
|             | Neil Goldman, Senior Partner, GCS Inc.                               |
| 2:45 - 3:00 | Break & Networking                                                    |
| 3:00 - 3:30 | **“The CCUL League Update”**  
|             | Diana Dykstra, President of the California & Nevada CU Leagues       |
| 3:30 - 3:45 | **“Bite of Reality Financial Literacy Program”**  
|             | Tena Lozano, Director of the RMJ Foundation                          |
| 3:45 - 5:00 | **CEO PANEL:**  
|             | Bill Cheney, President/CEO of SchoolsFirst FCU                       |
|             | Carrie Birkhofer, President/CEO of Bay FCU                           |
|             | Brett Martinez, President/CEO of Redwood CU                          |
| 5:00 - 7:00 | Reception at the SCCUA Partner Pavilion                              |

**Tuesday, June 16, 2015**

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| 9:15 - 10:15 | **“Innovation in the Credit Union Industry”**  
|             | Tansley Stearns, Chief Impact Officer, Filene Research Institute  
|             | Danielle Brehmer, VP of Marketing, Lake Trust CU                     |
| 10:15 - 10:30 | Break & Networking                                                    |
| 10:30 - 11:45 | **Closing Keynote Address – “Your Defining Moment”**  
|             | Dr. Natalie Stavas, Harvard Dr., Motivational Speaker,               |
| 11:45 - 12:00 | Conference Recap and Adjournment                                       |
| 12:00 - 1:15 | Lunch & Networking at the SCCUA Partner Pavilion                     |
| 1:30 - 6:30 | Golf or Spa (registration/reservation required)  
|             | Golf Announcements @1:30 tee off @ 1:45                              |
| 6:30 - 7:30 | Golf Reception - RED Restaurant patio                                 |