

CUMA CONFERENCE 2011

PLATINUM SPONSORS



Believe it... Achieve it!



Join Ontario's
Credit Union Leaders
September 18th to 20th, 2011
Queen's Landing Hotel
Niagara-on-the-Lake

The Annual CUMA Conference

**DON'T MISS OUT...
SIGN UP TODAY!
EARLY BIRD CUT-OFF
AUGUST 15TH**

Who Should Attend?

Credit Union Leaders • Presidents & CEOs
General Managers • Senior Management.

Why the CUMA Conference?

This is the conference that gives credit union executives and future leaders the tools, the connections, the information and the inspiration to take their credit unions to the next level.

Go to www.cuma.ca to register.

CUMA AGM

How are you going to make your mark in the Credit Union Industry? Why not consider representing your peers and colleagues by running for a seat on the CUMA Board of Directors? The Credit Union Managers' Association (CUMA) attracts industry professionals who share a vision of co-operative principles for financial services. These decision makers benefit from attendance at the annual conference where small, medium and large credit unions stand on equal footing in an exchange of best practices, challenges and success.

Be sure to attend the CUMA AGM and luncheon at 11:30 am on Monday the 19th. Agenda items include: President's Report; Treasurer's Report; Elections; New Business.

SUBMIT your nomination for the 2011 Alan Marentette Manager of the Year Award before September 1st.

Nomination procedures outlined on page 9.



About The Place

Queen's Landing Hotel, Niagara-on-the-Lake

Experience stately Georgian-style elegance and gracious service in a spectacular Niagara-on-the-Lake waterfront setting.

Here, at the meeting point of the Niagara River and Lake Ontario, Queen's Landing is an ideal location for a romantic leisure getaway or a successful business meeting.

Natural light pours in the floor-to-ceiling windows. The sweeping staircase invites an entrance worthy of Scarlett O'Hara. Marble floors and a stained-glass ceiling define Queen's Landing as a mansion with style.

You can find any additional information about our property on our web site - www.vintage-hotels.com

What To Wear

Casual business attire is recommended for the conference. Business attire is recommended for the Awards Banquet.

BELIEVE IT... ACHIEVE IT

SPEAKERS

“HOW TO THINK LONG TERM IN A SHORT TERM WORLD”



Bill Rancic

New York Times
Best-selling author,
Donald Trump's original
Apprentice, Co-Host of
A&E's We Mean Business
makeover show.

Many strategies helped make Bill Rancic a successful entrepreneur. From starting a boat wash and wax business while in college to running a million dollar company and working for Donald Trump, Bill will share the ups and downs on his road to success. Bill's talk gives the audience a glimpse at lessons he has learned throughout his many business experiences. Thinking long-term in a short-term world was a proven strategy used to help him on his path to success. This motivational speech is packed with advice that audience members can apply to their lives immediately.

“DECISION-MAKING: SEEING, FRAMING, DOING”



Dr. Tina Dacin

E. Marie Shantz
Professor of Strategy
and Organizational
Behaviour, Queen's
School of Business

Dr. Dacin is the Director of the Queen's School of Business Centre for Responsible Leadership, Area Coordinator of the Organizational Behaviour group, and a member of the University Senate at Queen's University. She is the recent past Chair of the Corporate Strategy and Governance group of the Strategic Management Society, the leading association for strategy professionals, and recent past Chair of the Organization and Management Theory Division of the Academy of Management. A lot of managerial work involves making decisions. This workshop focuses on how individuals make sense of the world around them and how it impacts the choices they make. The session will cover a number of decision making topics, especially how the framing of information affects managerial decisions.

BELIEVE IT... ACHIEVE IT

SPEAKERS

1. "THE ART OF EXECUTION"
2. "GOVERNANCE AND THE TOUGH DECISIONS"



Kim Andres

President and principal consultant at Andres Consulting Inc. a boutique agency that provides management consulting services to Canada's credit unions and affiliated organizations.

For more than 25 years Kim has held executive level positions at the local, regional, provincial and national levels of our system, including 10 years of consulting support to credit unions from coast-to-coast. In addition to her on-the-job experience, Kim has attended the Advanced Leadership Institute at Harvard University, has a Masters of Business Administration (MBA) degree from Queen's University, is a Fellow with the Credit Union Institute of Canada (FCUIC), a Certified Management Consultant (CMC) and a Certified Corporate Director (ICD.D). An engaging and insightful speaker with a wealth of knowledge and experience, Kim's goal is to assist her client credit unions to identify, develop and implement strategies to achieve their goals and objectives.

"BUILD THE OPTIMAL ENVIRONMENT FOR SUCCESS"



Don Bell

Founder and Former Executive Vice-President, WestJet

As one of the Founders of Canada's "Favourite Airline", Don Bell knows that when you win the hearts & minds of your people they will serve your customers better than anyone else and take your business to amazing heights!

In this captivating presentation, Don tells audiences how a simple formula, coupled with some down to earth common sense principles, was the key to WestJet's unparalleled corporate culture and Customer Experience. His compelling messages about People and creating an optimal environment will provoke, enlighten, and offer great take-away value for any organization driven for success.

2011 Platinum Conference Partners

CUMIS®

The CUMIS Group Limited (CUMIS) partners with credit unions to deliver competitive insurance and financial solutions. In doing so, it creates financial security and promotes the growth and success of the credit union system in Canada. CUMIS' principal companies are CUMIS Life Insurance Company and CUMIS General Insurance Company, and it has a 50 per cent interest in Credential Financial Inc. CUMIS is jointly owned by Co-operators Life Insurance Company and Central 1 Credit Union.

www.cumis.com



the co-operators
A Better Place For You®

The Co-operators Group Limited is a Canadian-owned co-operative with more than \$42 billion in assets under administration. Through its group of companies it offers home, auto, life, group, travel, commercial and farm insurance, as well as investment products. The Co-operators is well known for its community involvement and its commitment to sustainability. The Co-operators is ranked #2 among the 50 Best Corporate Citizens in Canada by Corporate Knights, and listed among the 50 Best Employers in Canada.

www.cooperators.ca

Gold Sponsors



Central 1

Central 1 is the central financial facility and trade association for the B.C. and Ontario credit union systems. Central 1 represents a consumer-oriented, full-service retail financial system that serves 2.9 million members and holds \$70 billion in assets and is owned primarily by its member credit unions, 45 in B.C. and 126 in Ontario. With offices in Vancouver, Mississauga, and Toronto, Central 1 provides a wide range of services such as liquidity management, direct banking, and flexible payment service solutions. For more information, www.central1.com



CGI

CGI Services to Credit Unions, delivers to Canadian credit unions an expanded solution portfolio in order to compete with global players, while maintaining and developing community values. In addition to our proven core banking solutions, we offer a full range of ancillary tools including loans origination, delinquency management and relationship management to credit unions coast-to-coast. www.cgi.com



DOXIM

Doxim Inc., headquartered in Markham, Ontario, provides a full suite of enterprise content management products and services for credit unions that together provide a web-based alternative to the printing and mailing of customer-centric documents such as statements, bills, cheque images and transaction records. www.doxim.com



EVERLINK

Everlink Payment Services Inc. is a recognized leader in the dependable secure delivery of Electronic Transaction Processing services and Integrated Payment Solutions in Canada. Everlink has achieved PCI-DSS standards, is fully network compliant and EMV certified, and is the first company in Canada to instantly issue a fully personalized, Interac and MasterCard certified EMV Chip card for financial institution clients. Visit www.Everlink.ca



1st FINANCIAL

1st Financial Building Corporation - "Building success stories coast to coast ... one credit union at a time". www.1stfinancialbuilding.com



LEVEL FIVE
strategic partners inc.

Level Five Strategic Partners is combining classroom-style practical training with CU Training's e-learning tools to deliver a comprehensive director training program. CU Training, based in British Columbia, is the learning partner for more than 400 credit unions in North America with a library of over 200 content rich credit union training programs. Level Five has developed and delivered a comprehensive classroom-style board of directors training program reviewed by Wilfrid Laurier Universities Executive Development Centre.



CU TRAINING INC.



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better banking software™

Strategic Information Technology Ltd. (SIT) develops and sells Portfolio Plus, a complete, real-time credit union software solution that includes everything from core banking and web banking to third party interfaces. When you combine Portfolio Plus banking software with our professional services you could achieve market breakthrough results like many of our customers have. www.stratinfotech.com

CUMA is proud to offer credit union professionals exceptional value by securing sponsorship dollars to help defray your costs. We extend special thanks to all our Sponsors for their generous contributions.

CUMA CONFERENCE 2011



CONFERENCE SCHEDULE



Sunday, September 18th

- 8:00 am - Noon**CUMA Golf Tournament - *Sponsored by CGI*
Not included in Registration fee. Register online at www.cuma.ca as part of your conference registration.
- 4:00 pm - 6:30 pm**.....Registration
- 5:30 pm - 8:00 pm**.....Welcome Cocktail Reception for all participants and guests. - *Sponsored by 1st Financial*
- 9:00 pm**Hospitality Suite - *Sharon Wilson, The Benefit Lady*



Monday, September 19th

- 7:30 am**Hot Buffet Breakfast - *Sponsored by Threshold Financial*
- 8:30 am**Opening Remarks
- 8:45 am**Plenary Keynote Speaker - **Bill Rancic, "How to Think Long Term in a Short Term World"**
- Sponsored by Strategic Information Technology
- 10:00 am**Nutrition Break - *Sponsored by Infonancial Software.*
- 10:30 am**Plenary Keynote Speaker - **Dr. Tina Dacin, "Decision-Making: Seeing, Framing, Doing - Session 1"**
- Sponsored by Central 1
- 11:30 am**CUMA AGM and Luncheon - *Sponsored by Doxim*
- 1:30 pm**Plenary Interactive Workshop - **Dr. Tina Dacin, "Decision-Making: Seeing, Framing, Doing - Session 2"**
- Sponsored by Roler
- 2:45 pm**Nutrition Break - *Sponsored by CUETS Financial*
- 3:15 pm**Plenary Keynote Speaker - **Kim Andres, "The Art of Execution"**
- Sponsored by LevelFive Strategic Partners & CU Training Inc.
- 4:30 pm**End of session for the day
- 6:30 pm**Reception - *Sponsored by CRI Canada*
- 7:30 pm**Banquet and Awards Dinner - *Sponsored by Concentra Financial*
- 9:30 pm**Hospitality Suite - *Sponsored by Perception Web Management*



Tuesday, September 20th

- 7:30 am**Hot Buffet Breakfast - *Sponsored by Diebold*
- 8:30 am**Plenary Keynote Speaker - **Kim Andres, "Governance and the Tough Decisions"**
- Sponsored by Smart Solution
- 10:00 am**Refreshment Break - *Sponsored by CUMA & Queen's Executive Management Program*
- 10:30 am**Plenary Keynote Speaker - **Don Bell, "Build the Optimal Environment for Success"**
- Sponsored by Everlink
- 12:00 pm**Closing Comments and Announcements
- 12:15 pm**Pick up your "Lunch on the Run" and have a safe journey home!
- Sponsored by Johnson Inc.





CONFERENCE REGISTRATION

Conference fee for delegates also includes Sunday Welcome Reception, Nutrition Breaks, Hot Buffet Breakfast, Lunches, Monday Evening Reception and Awards Banquet. HST is extra. Companion Fee includes all meals, breaks and receptions.

MEMBERSHIP FOR 2011!

CUMA Membership Fee is included in the price of the conference registration at NO EXTRA COST (If not attending the conference, new memberships and renewals are available online at www.cuma.ca).

	EARLY BIRD	AFTER AUG 15TH, 2011	COMPANION FEE
	(GST/HST additional)	(GST/HST additional)	(GST/HST additional)
Registration	\$ 895	\$ 995	\$ 350
Multiple Registration**	\$ 450	\$ 550	\$ 350

Dietary concerns? - please email cumainfo@cuma.ca before Sept 1

*** Multiple Registration: applies to the second & additional registrants of credit unions registering two (2) or more participants. This great offer is only applicable to eligible credit union managers.*

All Early Bird registrations will be entered into a draw for a cash prize.



Thanks to our Early Bird sponsor First Data.

HOW TO REGISTER!

Register On-Line at www.cuma.ca using our simplified registration process!

CANCELLATIONS

Refunds will be given for cancellations received by the Administrative Assistant at cumainfo@cuma.ca, no later than September 1st. A fee of \$100.00 will be applied to ALL cancellations. Refunds for eligible cancellations will be processed following the conference. We regret we cannot give refunds after September 1st; however delegate substitution will be permitted with the appropriate adjustment in fees.

Need more information? Call 1-800-263-CUMA (2862) or e-mail cumainfo@cuma.ca



ROOM RESERVATION *QUEEN'S LANDING HOTEL*

Via Web: https://reservations.ihotelier.com/crs/g_reservation.cfm?groupID=601269&hotelID=13127

Via Telephone: 1-888-669-5566 • Via Fax: 1-905-468-1472 Attention: Conventions Department

Group Name: **Credit Union Managers Association, 2011 Annual Conference**

Reservation Number: **920740**

Date: **Saturday, September 17 to Tuesday, September 20, 2011**

Name:	Telephone:
Address:	Fax:
	Email:
	Guestroom Type Preference:
Arrival Date:	
Departure Date:	Number of Guests:
	Confirmation Method: <input type="checkbox"/> Email <input type="checkbox"/> Fax <input type="checkbox"/> Phone
Please note: The entire hotel is Non-Smoking.	

Room availability is only guaranteed until Friday, August 26th

Guestroom Type	Saturday September 17, 2011	Sunday September 18 to Tuesday, September 20, 2011
Traditional	\$289.00	\$239.00
Deluxe/Premium	\$339.00	\$289.00
Suites	\$489.00	\$339.00

The above rates are quoted per person, per night, single or double occupancy and are subject to availability.

The above rates are quoted in Canadian Funds, and exclusive of applicable tax of 13% HST.

Additional property information can be found by visiting www.vintage-hotels.com

CREDIT CARD GUARANTEE:

Credit Card Type & Number: _____

Name on Card: _____

Expiration Date: _____ Credit Card security code (found on back of card): _____

CANCELLATION POLICY: Cancellations must be received up to 48 hours prior to arrival date so as to avoid any penalties or fees. Cancellations after this time are subject to one night's room and tax charges, or alternate penalties as applies to special packages or promotions. Credit card is required at time of reservation in order to guarantee your booking.

Check-in time is 3:00 pm and check-out time is 11:00 am

Queen's Landing Hotel
 155 Byron Street
 Niagara-on-the-Lake, ON L0S 1J0
 Telephone 905-468-2195
 Toll Free 1-888-669-5566
reservations@vintage-hotels.com



THE ALAN MARENTETTE MANAGER OF THE YEAR AWARD

CO-SPONSORED BY: **CUMA** and **LEVEL FIVE**
strategic partners inc.

What is The Alan Marentette Manager of the Year Award?

The late Alan Marentette was a leader in the credit union system for over four decades. Among his many contributions and accomplishments, Alan was one of the original founders of CUMA, which was established over 25 years ago. Alan exemplified the high standards of leadership and service that this award was developed to recognize. Level Five Strategic Partners Inc. and The Credit Union Managers' Association (CUMA) are pleased to sponsor the 'Alan Marentette Manager of the Year Award'. The award is designed to recognize those managers who exemplify a high standard of leadership and service to credit unions, their owners and communities.

The Recipient of this Prestigious Award Will Receive:

- A \$2,000 donation made on their behalf to the Ontario Credit Union Charitable Foundation
- An individual award of recognition to proudly display in their office
- A letter of recognition for their achievement
- A feature on the CUMA and Level Five web sites

Who should be nominated?

The ideal candidate for The Alan Marentette Manager of the Year Award demonstrates high standards of leadership within their credit union, the credit union system, and their community. Keeping in mind CUMA's mission statement, the successful candidate will be selected based on the contributions of the individual to serve those around them. If you know someone that you feel deserves recognition for their contributions, we invite you to submit their name for nomination. Candidate must be working in a management position in an Ontario credit union. Anyone previously nominated, who has not won the award, is again eligible.

Nomination Procedures

1. Identify a Manager you feel is deserving of this prestigious award. All active members of CUMA in good standing as defined by the CUMA general by-law (www.cuma.ca) are eligible for this award.
2. Nominations must include the following information, as well as any additional information you feel is warranted as subsequent appendices.
 - Nominee (name, position, and Credit Union)
 - Contact information of nominators (2 nominators required)
 - Career biography
 - Performance record while managing the credit union
 - Community activity and achievement (outside of the credit union)
 - Internal staff testimonials (ranging from front line staff, supervisor level, management and board)
 - System activities and achievements (within the credit union system)
3. E-mail completed nomination no later than September 1st, 2011 directly to Heather MacDonald, as one of three CUMA Directors that comprise the Alan Marentette Manager of the Year selection committee.

NOMINATION SUBMISSIONS:

Heather MacDonald, Peoples Credit Union
hmacdonald@peoplescu.ca
705-436-2044 ext. 224
8034 Yonge Street, Innisfil, ON L9S 1L6

Nominations will be acknowledge upon receipt. If you have not received an acknowledgement within five working days of submission, please contact Heather MacDonald (705-436-2044).

4. The successful nominee will be presented with their award by CUMA and Level Five Strategic Partners at the annual fall CUMA conference and awards banquet.



10TH ANNUAL CUMA GOLF TOURNAMENT SUNDAY, SEPTEMBER 18TH, 2011

Sponsored by  CGI

LEGENDS ON THE NIAGARA

9561 Niagara Parkway, Niagara Falls, Ontario • www.niagaraparksgolf.com/legends

For those who would like to start off the conference with the enjoyment of a good game of golf with their fellow managers and conference sponsors, we welcome you to join us for our tenth annual conference golf tournament.

This year's tournament includes specialty prize holes and tee off begins at 8:04 a.m. with the last group off about noon.

Cost for 18 holes of golf, including golf cart, driving range and lunch is \$130.00 (taxes extra).

DON'T MISS OUT! Golf registrations are limited to the first 72 golfers!

HOW TO REGISTER!

Golf sign up is part of your conference registration form at www.cuma.ca

Every effort will be made to accommodate preferred tee-times on a first come first serve basis. All golfers will be notified of their tee-times one week prior to the event.

Companions or spouses wishing to register for golf should contact the CUMA Administrator via e-mail at cumainfo@cuma.ca



Need more information? Call 1-800-263-CUMA (2862) or e-mail cumainfo@cuma.ca