



## Annual Conference

May 11-13, 2016

Hard Rock Hotel, San Diego

Our annual conference was held in San Diego with over 40 HR & Training professionals in attendance.

The conference provided for fun networking opportunities, reuniting with friends and making new ones. The conference sessions were rockin' as you'll see from the presentation recaps below. Whether you were able to make it to the conference or not, we wanted to provide you with a summary of the topics and insights from throughout the event. We hope this information proves to be beneficial and you'll plan on joining us next year!

### **Creating a Culture That Creates Engagement** by Mike Neill – Michael Neill & Associates

Mike Neill articulated that, "Members will never love your credit union until the employees love it first." Because Missional Leaders create employee engagement, and employee engagement and financial performance are linked, our leaders need to foster these factors:

- A compelling, positive mission with clear goals
- Communication
- Hiring the right people
- Teamwork
- Continuous improvement and innovation
- Recognizing and rewarding performance
- Accountability

Mike went on further to present a "to do" list for Missional Leaders:

- Create and communicate a compelling mission
- Transform behaviors in alignment with mission
- Don't facilitate institutional effort equity
- Have a commitment to both internal and external service
- Move the organization from over-managing to coaching

### **Work-Life Balance is Bunk** by Jon Hernandez - CEO of CalCom FCU, City of Downey FCU, and Mattel FCU

Jon Hernandez shared his experience as a Shared CEO for three credit unions and how he makes it all work. He also shared the history and activities of the Southern California Credit Union Alliance (SCCUA) which he founded and now serves on the Board. With all of these responsibilities, Jon shared his thoughts on work life balance, including asking the audience to think about work life balance relative to:

- The eight equities: Physical, Spiritual, Psychological, Intellectual, Emotional, Financial, Social and Family
- Our Economic Era: The Digital Era

- Cultural Background
- Career Period: Starting, Middle or Retiring
- Life Needs

The important thing is...

- Not to be concerned with society's description of work life balance
- To set your goals, develop a plan, identify the tasks to achieve your goals and know that some of the tasks may throw off your work life balance
- To find a job that's "the right fit" because it's not work if you love what you do

## **Leverage the Power of Personality** by Dr. Heather Backstrom – Executive Coach

Dr. Backstrom explored concepts from the Myers–Briggs Type Indicator (MBTI) assessment to better understand ourselves and others. Participants learned about adjusting their styles for enhanced work relationships. Attendees created plans to strengthen workplace relationships. Dr. Backstrom stressed that the goal of knowing about personality types is to understand and appreciate differences between people.

## **Conflict Resolution** by Joel Landi – Founder/CEO, The Performance Group

Unresolved conflict is costing \$359 Billion in paid hours a year. 95% who receive conflict resolution training say it is the biggest driver of success. However, 60% of the work force will never receive this training. 75% report positive outcomes from conflict that would have NOT been realized without the conflict training. 25% of the work force will be admit to using a sick day or leave of absence as a result of unresolved conflict\*.

Conflict in the workforce can come from a multitude of places. Whether its [1] changed priorities, [2] differing opinion of results or goals, [3] process or [4] status — it comes down to **relationship**. Relationship can be further broken down into:

- Character
- Competency
- Communication / Leadership Style
- Personality Type [Myers Briggs]
- Conflict Management style

Although it is imperative to lay certain ground rules to resolving conflict like [1] confront the issue, not the person and [2] showing mutual respect — what makes this tension filled process attractive is when the conflict practitioner holds out the promise of the reward of conflict. What is that reward? It is a new or improved ability to [a] communicate, [b] raise emotional intelligence by becoming more self-aware to personal attributes that diminish relationships and cap leadership, [c] use collaboration to solve problems and lead others and [d] changes the culture of a company by bringing new confidence & trust through resolution.

Instead of dreading the pain and awkwardness, conflict resolution can be embraced as a pathway to professional & personal discovery. Using the tension of conflict as a springboard to remove unwanted aspects of our character, we build better teams, create greater ideas, and solve bigger problems. Bottom line: when we allow the process of resolving conflict to change us, we become better people.

\*2008 CCP Global Human Capital Report / 2009 Harvard Law School Special Report on Managing Conflict

## **Healthcare Reform 2016** by Tobias Kennedy

The Affordable Care Act can be dense and confusing. During his presentation, attendees learned everything they need to know in order to understand exactly which pieces of the legislation apply to them/their company. We covered:

- What makes a company an "Applicable Large Employer?"
- Which insurance products satisfy the requirements-- and how to price the premiums for compliance?
- What employees qualify as benefits eligible-- as well as how to apply/track the Measurement and Stability period?
- How to properly report insurance offerings to the IRS and to your employees.

## **Human Capital: Creating an ROI in HR** by Dr. Brandi Stankovic

Creating value in a company goes beyond hiring the best employees. It means working with various department heads to create programs that engage employees, reduce employee turnover and increase productivity. We discussed the secrets to increasing the company's bottom line through increased employee productivity and effective leadership at all stages of development. We were also given the tools needed to assess the leadership abilities of other managers and teach them how to create engagement programs in their own departments, reducing employee turnover. Brandi motivated, made us dance, and challenged us to take action! By the end of the session we had the essential tools needed to create a strategic plan for: 1) building rapport & trust with your team and throughout the credit union 2) developing the critical elements needed to increase productivity and profits.

Our lucky attendees received Brandi's new book, *The Strategic MVP*, which incorporates thought-provoking and effective exercises to deepen and grow your leadership traits.

## **Legal Update** by Michele Patterson, J.D. – Employment Law

Highlights from Michele's update include:

1. California minimum wage going up each January starting 2017 to \$10.50. Also watch all the cities where your credit union has offices for higher minimum wage and/or paid sick leave requirements.
2. New federal minimum wage regulation requiring exempt employees to be paid \$47,476 starting 12-1-16. Verify now if any exempt employees are under that annual salary.
3. Misclassification of employees as exempt is the biggest litigation risk. Double check all exempt employees meet all criteria for exempt status.
4. Recommend pay audit to verify compliance with the new California Fair Pay Act, and more importantly equal pay law, regarding male and female employees.

5. First case of Associational Disability Liability expands protection for employees who take time off to assist any disabled person.

## **The Human Side of Data Security** by Ron Burns – Chief Information Security Officer @ Kern Schools FCU

We ended the conference learning how to create a security culture in our credit unions. Some of the items he touched on were:

- Social Engineering
- Credit Union Considerations
- Phishing
- Elements in an Effective Training Program.
- Breaches

This was a very eye opening topic and many of the attendees were eager to get back and share the information with their credit unions.

## **Congratulations to our Annual Award Winners!**

Each year, HRD Network members have the opportunity to recognize their peers by nominating them for one of three prestigious awards in the Human Resources and Employee Development fields. The winners for 2016 were:

**HR PROFESSIONAL OF THE YEAR** is an award recognizes an HR Professional who has excelled in the Human Resources field. The winner this year was Janet Mainenti with Point Loma Credit Union. Congratulations, Janet! Well deserved!

**SUZANNE CARLISLE HRD NETWORK TRAINER'S SCHOLARSHIP** is an award that recognizes a Trainer who has shown excellence in educational initiatives. The award recipient receives a scholarship for \$500 to be used towards admission to training and development events. The winner this year was the dynamic training duo, Matthew Rosenthal and David Gregg with Financial Partners Credit Union. Congratulations, Mathew & David!

**PATTI REED EDUCATIONAL SCHOLARSHIP** was created to provide small credit unions (less than \$100M in assets) with access to training and professional development opportunities. The award recipient receives a scholarship for \$500 to be used towards admission to training and development events. This year's recipient was Media City Community Credit Union. The check was presented to Ana Ordonez.

### **Some closing comments from our attendees:**

- Awesome!
- One of our best ones yet!
  
- Wonderful time networking and re-energizing with creative ideas
- Great! Good useful info - networking fantastic.
- Great conference! Awesome group!

- I love the inclusion of how this HR group is particularly and I thank the HRD Network for ensuring this inclusiveness is met through the selection of speakers and format of this conference.
- As a 1st time attendee, I found the conference to be very valuable.
- Topics were very relevant, informative.
- Attendees were all very cooperative. Looking forward to future events.

**Special thanks to our business sponsors for supporting another successful conference:**

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