



## Annual Conference

March 15-17, 2017

Green Valley Ranch, Las Vegas



Our annual conference was attended by HR and Training Professionals from California and Nevada. Established in 1986, the HRD Network enhances productivity, morale and practical knowledge by creating a collaborative network of HR and Training professionals. We are pleased to share that the attendees rated the overall value of the conference a high 9.18 on a scale of 10!



Some of the attendees rockin' the conference! After all, you can't spell #HeRo without HR!

The conference provided for fun networking opportunities, reuniting with friends and making new ones. Whether you were able to make it to the conference or not, we want to provide you with a recap of the topics and insights shared from our memorable event. We hope this information proves to be beneficial and you plan on joining us next year!

## **Emotional Intelligence** by Dr. Brandi Stankovic – Mitchell, Stankovic and Associates

Brandi Stankovic, Senior Partner at Mitchell Stankovic and Associates consulting, and Board Liaison for HRD Network energized the group with her presentation, **“Emotional Intelligence: EQ more important than IQ?”** The session included discussions and research. Emotional Intelligence is the ability to identify, use, understand, and manage emotions in positive ways to relieve stress, communicate effectively, empathize with others, overcome challenges, and defuse conflict. An EQ leader understands what matters; wins support for ideas, vision and direction; and motivates a team that will collectively move together toward achieving the vision. We learned in this session the key strategies for leading, retaining talented team members by helping them achieve their goals, building emotional intelligence to communicate effectively, and supporting a culture that promotes professional growth.

## **Financial Peer Comparisons** by Suzanne McGann – Callahan & Associates

Suzanne explained ways that credit unions can compare themselves to other credit unions and some specific comparisons related to human resources and training. Peer-to-Peer software and CUAnalyzer includes all of the data points from the NCUA 5300 and FDIC call reports. Using this data, Suzanne provided examples of how to customize your benchmarks with similar peer groups to see how you compare to them. It proved to be an easy to use and helpful tool.

If you need support on Peer-to-Peer or need access, please contact Suzanne McGann, Functional Analyst at [smcgann@callahan.com](mailto:smcgann@callahan.com).

## **Custom Video – How to Shoot Your Own for High Employee Engagement & Learning** by Brad Shirilla, LA Police FCU and Shonna Shearson, Kern Schools FCU

By creating their own “training” videos, conference attendees discovered how quick and easy it can be, while realizing the amazing benefits:

- Increase employee engagement at work
- Save money over contacting with a professional film crew
- Infuse energy into your organization as creativity is unleashed
- Create interest in the training topic
- Provide memorable lessons
- Improve morale
- It’s FUN!

Participants developed their own scripts, directed, acted and edited their videos. Filming was done with our smart phones, and editing was done with a free app, either Adobe Premier Clip or iMovie. If you want a quick tutorial on Adobe Premier Clip, here is a link to a good one.

<https://helpx.adobe.com/mobile-apps/how-to/premiere-clip-create-edit-video.html>

See some of these awesome videos on our members only group page on Facebook. Connect with us under the group name, [Credit Union HRD Network](#).

## **Succession Planning** by Sue Mitchell – Mitchell, Stankovic and Associates

Susan Mitchell, one of the HRD Network founding members and CEO of Mitchell Stankovic and Associates, discussed leadership transitions and organizational redesign. She challenged the group with her perspective. Human resource professionals are in key positions to be at the table during executive discussions. They are in charge of representational risk, culture development, and organizational health. Not to mention their area typically controls up to 60% of the bottom line, because it is people related. Human Resources are the HEROs and the face of the credit union. Sue shared how she believes the HR professionals are the next CEO candidates, and we need to be telling that story!

## **Wellness Activities, Programs and Best Practices** by Tobias Kennedy – Montage Insurance Solutions

In a broad approach to what “health” is, Tobias Kennedy covers a few timely topics. Starting the presentation with an overview of personal health, Tobias dives into some of the science behind nutrition, the process of how the body accumulates/stores fat, as well as some dietary tips that can help people eat around this process and use their habits to maximize fat burn. From there, he transitions from viewing the attendees as individuals into addressing them in their roles at the employer-level. The presentation shifts to taking some of these health facts and equipping attendees with tools to launch, improve, or fine tune their company wellness programs. Tobias covers samples and gives ideas that attendees can put in to place right away, as well as some tips on ensuring the success of a wellness initiative. Lastly, in the vein of “health” Tobias closes by discusses changes in the health insurance world. With legislative agendas shifting the health insurance marketplace, Tobias cover some of the key “need to knows” as we all attempt to keep pace with Washington D.C.

## **Legal Update** by Cristina Miller, Partner – Styskal, Wiese & Melchione, LLP

Highlights included:

- Changes to Fair Pay Act, effective January 1, 2017
  - a. Expanded to prohibit pay difference based on race or ethnicity (SB 1063).
  - b. Prior salary may not be the only reason for a wage disparity (AB 1676).
  - c. Bona fide factor other than sex, race or ethnicity.
  - d. Assess current compensation practices
- Overtime Rule Update
- Wage Statements: Traps for Employers!
- Hiring Considerations: Background Checks and Ban-the-Box Rules
- Harassment, Discrimination, And Retaliation Updates
- All-Gender Bathrooms
- Domestic Violence, Sexual Assault & Stalking Victims
- Legalization of Marijuana – What Should Employers Do?
- Other Smoking Restrictions (ABX2-7)

In the legal update, attorney advised including in all our hiring notices and advertisements this statement: *Your Name CU follows the City of Los Angeles “Ban-the-Box” ordinance.*

Also, in our offer letters, we need to reference the following statement if you are making conditional job offers prior to background check being completed: *Your Name CU follows the Los Angeles Fair Chance Initiative for Hiring (Ban-the-Box).*

Here are some links to learn more about the ordinance, which went into effect on January 22, 2017. The LA Fair Chance Ordinance posters should be up and your employment application form should be updated with the removal of the criminal record question.

[City of LA Fair Chance Initiative for Hiring](#)

[LA Enacts Ban the Box Legislation](#)

## **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 2017 were:

**HR PROFESSIONAL OF THE YEAR** is an award recognizing an HR Professional who has excelled in the Human Resources field. The winner this year was **Norma Feder-Dong**, VP of Human Resources & Support Services with Los Angeles Police FCU. Congratulations, Norma! 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 talented, **Kristen Hartsell**, FSO Training Specialist with Kern Schools FCU. Congratulations, Kristen!

## Suzanne Carlisle Trainer's Scholarship

Congratulations to  
Trainer of the Year...

**Kristen Hartsell**  
FSO Training Specialist  
Kern Schools FCU

**PATTI REED EDUCATIONAL SCHOLARSHIP** was created to provide small credit unions (less than \$250M 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 Solano First FCU. The check was presented to **Jan Larsen, VP of Administration with Solano First FCU**.

## Patti Reed Educational Scholarship

Congratulations...

**Jan Larsen**  
VP, Administration  
Solano First CU

## Some closing comments from our attendees:

Really engaged me the entire process.  
I loved it!  
10+++  
Very much appreciated – my first one – I will be back.  
Great information & networking.  
Such a warm, welcoming group!

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

HR Performance Solutions  
ADDvantage CU Staffing  
Montage Insurance Solutions  
Styskal, Wiese & Melchione, LLP  
O'Rourke & Associates  
Laura Conover Consulting  
Neal Sachs  
Xceed Financial Credit Union

## Thanks to our AMAZING volunteer board of directors for hosting an annual conference to remember!

<h1>HRD Network Board</h1>		
Volunteers	Board Seat	Credit Union
Janet Gaspard	President	Los Angeles Police FCU Manager, Human Resources
Courtney Lynch	Vice President	Xceed Financial CU VP, Human Resources
Rebecca Nixon	Treasurer	San Mateo CU VP, Employee Relations
Jenee Rawlings	Secretary	Yolo FCU President/CEO
Mark Manns	Director	Kern Schools FCU VP, Human Resources
Shonna Shearson	Director	Kern Schools FCU VP, Contact Center & Training
Janelle Eaton-Escalante	Director	San Mateo CU Manager, Employee Relations
Martha Perea	Director	Caltech Employees FCU VP, Human Resources
Dr. Brandi Stankovic	Board Liaison	Mitchell, Stankovic, and Associates Senior Partner



We're pleased to introduce your newest Board Member!

**Martha Perea**

**Vice President, Human Resources**



Martha Perea is the Vice President Human Resources for Caltech Employees Federal Credit Union. She is responsible for the planning and administration of all functions related to human resources, payroll, and training, in addition to management coaching, and workplace health and safety. As part of CEFCU's senior management team, Martha's focus is on employee engagement, leadership development and maintaining their dynamic culture. She has more than 30 years of extensive related experience in credit unions and the hospitality industry.

Martha received her Bachelor of Science in Organizational Management from the *University of La Verne*, and a Professional Designation in Human Resource Management from *UCLA Extension*. In addition, Martha graduated from *Western CUNA Management School*, one of the leading credit union management schools in the nation. She holds a Senior Professional in Human Resources (SPHR) certification from the *HR Certification Institute*, and a SHRM-Senior Certified Professional certification from the *Society for Human Resource Management (SHRM-SCP)*.

By serving on its Board of Directors, Martha is looking forward to the opportunity to give back to the members of the HRD Network, a group that has proved invaluable in her career in the credit union industry.