



**JANUARY 29 - FEBRUARY 1, 2020**

**BONUS SESSION JANUARY 28, 2020**

**GRAND HYATT KAUAI RESORT & SPA**

**TUESDAY, JANUARY 28, 2020**

Time	Session	Room
7:30 – 8:30	Bonus Session Registration	
	<b>Bonus Session</b>	
8:30 – 12:30	<b>Volunteer Governance Tune-Up</b> <i>James L. This, President, James L. This &amp; Associates</i> <i>Tony Ferris, President &amp; CEO, Rochdale Paragon Group</i> <i>Jeff Owen, COO, Rochdale Paragon Group</i>	<b>Kauai Ballroom</b>
10:00 – 10:15	Morning Break	
11:30	Working Buffet Lunch (Bonus Session attendees)	
4:00 – 6:00	Registration	

## WEDNESDAY, JANUARY 29, 2020

Time	Session	Room
7:30 - 3:30	<b>Registration</b>	
8:15 - 8:30	<b>Welcome to Volunteer Leadership Institute</b> <i>James L. This, President, James L. This &amp; Associates</i> <i>Tony Ferris, President &amp; CEO, Rochdale Paragon Group</i>	<b>Grand Ballroom</b>
8:30 - 9:30	<b>Anticipating the Future: Developing Strategic Foresight</b> <i>Richard Lum, CEO, Vision Foresight Strategy</i>	<b>Grand Ballroom</b>
9:30 - 9:45	<b>Morning Break</b>	
9:45 - 10:45	<b>Regulatory Update</b> <i>Lucy Ito, President &amp; CEO, National Association of Credit Union Supervisors</i> <i>NCUA Regulator-To be Announced</i>	<b>Grand Ballroom</b>
10:45 - 11:00	<b>Morning Break</b>	
11:00 - 12:00	<b>Remaining Relevant for the Future</b> <i>Alexandra Gekas, Vice President Marketing &amp; Engagement, Callahan and Associates</i>	<b>Grand Ballroom</b>
12:00 - 1:15	<b>Lunch</b>	
1:15 - 2:15	<b>Breakouts (Choose One)</b>	
	<b>Developing Foresight and Anticipating Strategic Change</b> <i>Richard Lum, CEO, Vision Foresight Strategy</i>	<b>Grand Ballroom</b>
	<b>The Cannabis Decision</b> <i>Lucy Ito, President &amp; CEO, National Association of State Credit Union Examiners</i> <i>James Collins, President &amp; CEO, OBee Credit Union</i>	<b>Kauai Ballroom</b>
2:15 - 2:30	<b>Afternoon Break</b>	
2:30 - 3:30	<b>Breakouts Repeated (Choose One)</b>	
	<b>Developing Foresight and Anticipating Strategic Change</b> <i>Richard Lum, CEO, Vision Foresight Strategy</i>	<b>Grand Ballroom</b>
	<b>The Cannabis Decision</b> <i>Lucy Ito, President &amp; CEO, National Association of State Credit Union Examiners</i> <i>James Collins, President &amp; CEO, OBee Credit Union</i>	<b>Kauai Ballroom</b>
Evening	<b>On Your Own</b>	

**THURSDAY, JANUARY 30, 2020**

Time	Session	Room
7:15 – 8:30	<b>Buffet Breakfast</b>	
8:30 - 9:30	<b>Employees Gone Bad--How to Help Detect and Prevent Employee Dishonesty</b> <i>Ann Davidson, Vice President Risk Consulting, Allied Solutions</i>	<b>Grand Ballroom</b>
9:30 - 9:45	<b>Morning Break</b>	
9:45 - 10:45	<b>Brain Shift: Why Behavioral Economics is the Future of Credit Unions</b> <i>Melina Palmer, Founder, The Brainy Business</i>	<b>Grand Ballroom</b>
10:45 - 11:00	<b>Morning Break</b>	
11:00 - 12:00	<b>Who Will Speak for Credit Unions?</b> <i>Ryan Donovan, Chief Advocacy Officer, Credit Union National Association</i>	<b>Grand Ballroom</b>
12:00 - 1:15	<b>Lunch</b>	
1:15 - 2:15	<b>Breakouts (Choose One)</b>	
	<b>Scary Truth of Fraud – Top Fraud Trends</b> <i>Ann Davidson, Vice President Risk Consulting, Allied Solutions</i>	<b>Grand Ballroom</b>
	<b>Remaining Relevant for the Future: A Deeper Examination</b> <i>Alexandra Gekas, Vice President Marketing &amp; Engagement, Callahan and Associates</i>	<b>Kauai Ballroom</b>
2:15 - 2:30	<b>Afternoon Break</b>	
2:30 - 3:30	<b>Breakouts Repeated (Choose One)</b>	
	<b>Scary Truth of Fraud – Top Fraud Trends</b> <i>Ann Davidson, Vice President Risk Consulting, Allied Solutions</i>	<b>Grand Ballroom</b>
	<b>Remaining Relevant for the Future: A Deeper Examination</b> <i>Alexandra Gekas, Vice President Marketing &amp; Engagement, Callahan and Associates</i>	<b>Kauai Ballroom</b>
6:00	<b>Ohana Dinner</b> <i>Invitation only for Volunteers who have attended five or more Hawaii Institutes</i>	

## FRIDAY, JANUARY 31, 2020

Time	Session	Room
7:15 - 8:30	Buffet Breakfast	
8:30 - 9:30	<b>Economic Update</b> <i>Byron Gangnes, Professor, University of Hawaii at Monoa</i>	Grand Ballroom
9:30 - 9:45	Morning Break	
9:45 - 10:45	<b>Board Oversight of Disruptive Risks</b> <i>James Lam, President, James Lam &amp; Associates, Inc.</i>	Grand Ballroom
10:45 - 11:00	Morning Break	
11:00 - 12:00	<b>Intelligent Automation for Credit Unions</b> <i>Jesse McGannon, Vice President Advisory Services, Strategic Resource Management</i>	Grand Ballroom
12:00 - 1:15	Lunch	
1:15 - 2:15	<b>Breakouts (Choose One)</b>	
	<b>The Graying of the U.S. Economy</b> <i>Byron Gangnes, Professor, University of Hawaii at Monoa</i>	Kauai Ballroom
	<b>Getting the Right Risk Metrics and Reporting for the Board</b> <i>James Lam, President, James Lam &amp; Associates, Inc.</i>	Grand Ballroom
2:15 - 2:30	Afternoon Break	
2:30 - 3:30	<b>Asset Breakouts (Choose One)</b>	
	Breakout 1	
	Breakout 2	
	Breakout 3	
	Breakout 4	
Evening	Dinner in Paradise	

## SATURDAY, FEBRUARY 1, 2020

Time	Session	Room
7:15 - 8:30	Buffet Breakfast	
8:30 - 10:00	<b>2020 Vision: 20 Things to be Thinking About to See Your Way to the Future</b> <i>Frank Diekmann, Cooperator in Chief, CUToday.info</i>	Grand Ballroom
10:00 - 10:15	Morning Break	
10:15 - 11:30	<b>Running for Our Lives: the Campaign for the White House</b> <i>David Horsey, Political Cartoonist and Commentator</i>	Grand Ballroom
11:30	Institute Concludes	