



REGISTER EARLY TO  
GUARANTEE A ONE-ON-ONE  
COACHING SPOT

# 2018 BRANCH MANAGERS' KNOWLEDGE EXCHANGE

Join other credit union Branch Managers at the 5TH Annual, live-in, Knowledge Exchange which focuses on the important and key issues facing credit union Branch Managers.

It offers opportunities to engage in thought-provoking discussions, share knowledge, experiences and strategies in a challenging and open environment. Working together to find implementable solutions that can be quickly implemented and networking with your peers is a key component of the exchange.

**NEW!**

This year's Knowledge Exchange will include a Wednesday evening session plus participants will have the opportunity to speak one-on-one with a coaching specialist prior to the event. You can discuss a challenging situation, seek advice, support and receive immediate feedback.

You will implement what you've learned in a real coaching situation and bring the results back to the Knowledge Exchange group for discussion

## 2018 TOPICS INCLUDE:

- 3 P's of Performance Management
- Employee Engagement & Communication
- Leadership in Today's Credit Union World – Challenges & Rewards
- The Power of Coaching
- Risk Management – Claims Trends & Cyber Coverages & Exposure

## WHO SHOULD ATTEND

Credit Union Managers responsible for leadership, growth and profitability, operations, people management, motivation and exceptional member service. The Knowledge Exchange is the most effective way to expand your knowledge and network with your peers.

OCTOBER 17<sup>TH</sup>, 18<sup>TH</sup>, 19<sup>TH</sup>, 2018 – KINGBRIDGE CONFERENCE CENTRE, KING CITY, ON

LEVELFIVE  
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[www.levelfive.ca](http://www.levelfive.ca)

# BRANCH MANAGERS' KNOWLEDGE EXCHANGE

## WEDNESDAY – OCTOBER 17<sup>TH</sup>, 2018

3:00 – 5:00 pm	Registration
5:00 – 7:00 pm	Welcome Dinner
7:00 – 8:30 pm	<b>Joanna Pitek, PhD, MIRHR</b> <b>Professor Human Resources</b> <b>Lawrence Kinlin School of Business, Fanshawe College</b>

This session will involve a discussion of the three Ps of performance management through research evidence and industry best practices. Participants will develop employee profiles as standards of effective performance. Through discussions, a set of tools for dealing with employee performance will be developed for participants' managerial toolbox.

**Note: This session is open to Credit Union HR, Operations and Member Service Supervisors and Managers. See details below.**

*The Three Ps of Performance Management*

### Principles, Practices & Pitfalls

- What are the key principles of effectively managing employee performance?
- How can managers apply best practices to their everyday management of employees?
- What are some critical pitfalls in performance management and how can managers' best avoid these?
- Q & A

8:30 – 9:30 pm	Networking Cocktails
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## THURSDAY – OCTOBER 18<sup>TH</sup>, 2018

7:30 – 9:00 am	Networking Breakfast
9:00 – 9:45 am	Welcome/Introductions/Open Questions
9:45 – 10:30 am	<b>Barb Duffin - CHRP, SHEM Consulting</b> <i>Employee Engagement &amp; Communication</i>

**In this important session we will discuss the following questions:**

- How do you motivate your staff to achieve success?
- What is your vision for your branch and how do you effectively communicate your vision in order to achieve your desired team results?
- What are the consequences of poor communication?
- Q & A

10:30 – 10:45 am	Nutrition Break
10:45 am – 12:00 pm	<b>Theresa Mikula – FCUIC, Human Resources Consultant</b> <i>Leadership in Today's Credit Union World – the Challenges &amp; Rewards</i>

**This session will focus on the following:**

- Understanding what makes a good team leader.
- How do you, as a leader, create a motivating environment for employees to thrive?
- How do you as a leader manage the “nay-sayers” and how do you manage the “stars”?
- Exploring your abilities to further enhance strong leadership skills.

12:00 – 1:00 pm	Lunch
1:00 – 3:00 pm	<b>Barb Duffin - CHRP, SHEM Consulting</b> <b>Theresa Mikula – FCUIC, Human Resources Consultant</b> <i>The Power of Coaching</i>

**This interactive session will include real life challenges with implementable solutions. We will discuss:**

- How coaching can be the key to finding a better path moving forward with real change and better outcomes.
- How you can get the most from your best performers – your best performers can tell you a lot about personal motivation.
- How we sometimes forget about your best performers and spend all your time working with those not meeting the requirements. **Coaching is for all staff!**
- Q & A

3:00 – 3:15 pm	Nutrition Break
3:15 – 4:30 pm	Open Question/Knowledge Exchange
4:30 – 6:30 pm	Free Time
6:30 – 9:00 pm	Networking Dinner

## FRIDAY - OCTOBER 19<sup>TH</sup>, 2018

7:30 – 9:00 am	Breakfast
9:00 – 10:30 am	<b>Stephanie Reid, Senior Manager TCUBP and Underwriting</b> CUMIS – Risk Solutions Group <i>Claims Trends &amp; Cyber Coverage and Exposures</i>

**In this session we will focus on two key areas:**

1. How front-line staff can have a positive impact on claims mitigation.
  - a. We will have an interactive discussion on current claims trends, anticipated future claims trending and case studies with key learnings and takeaways for your branches.
2. Cyber coverage and exposures.
  - a. Everyone is talking about Cyber, but do you know how it relates to your credit union operations?
  - b. Do you know how your credit union is covered and where the system is seeing claims? In this interactive session we will dive into the cyber coverage. We'll talk about where we are seeing claims and how this affects both the credit union and the credit union members

10:30 – 11:30 am	Knowledge Exchange
11:30 – 12:00 noon	Closing Remarks
12:00 – 1:30 pm	Wrap Up Lunch

## LOCATION:

**Kingbridge Conference Centre** [www.kingbridgecentre.com](http://www.kingbridgecentre.com)

12750 Jane Street, King City (Toronto), Ontario L5B 1A3

Telephone: **1-800-827-7221**

## MEETING/HOTEL ACCOMMODATION PACKAGE:

**\$620.00 + HST (\$80.60) = \$700.60**

- *Your package costs include: 2 nights' accommodation, 2 full breakfasts, 2 buffet lunches, 2 dinners and continuous nutrition breaks, free parking, use of all facilities and high speed wireless internet.*

## WEDNESDAY EVENING ONLY SESSION FEE:

**\$95.00 + HST (\$12.35) = \$107.35**

## REGISTRATION FEE

**\$750.00 + HST (\$97.50) = \$847.50**

Make cheque payable to Level Five Strategic Partners Inc. in the amount of \$1,548.10 which includes meeting package price and registration fee.

## REGISTRATION FORM – 2018 BMKE

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Name of Credit Union: \_\_\_\_\_

Address: \_\_\_\_\_

Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

**Email your registration form to [cmirtl@levelfive.ca](mailto:cmirtl@levelfive.ca)**

**Make cheque payable and mail payment to:**

Level Five Strategic Partners Inc.

Suite 308, 6975 Meadowvale Town Centre Circle #9, Mississauga, ON L5N 2V7

For more information contact:

**Candis Mirtl at 1-289-244-6619 or [cmirtl@levelfive.ca](mailto:cmirtl@levelfive.ca)**