

# *CDD Spring Meeting & Capital Conference*

*April 5-6, 2017*

*Wyndham City Centre,  
Springfield*



*Voice Your Views  
Changing Culture  
Legislative Update*

*Development  
Sales Training  
Networking  
Leadership*

# CDD Spring Meeting & CBAI Capital Conference-Wednesday, April 5

For the 2017 CDD Spring Meeting, the CDD board of directors provides an opportunity for CDD members to become more involved in promoting community banking. Make your voice heard by meeting face-to-face with state legislators, constitutional officers, and regulators on pertinent issues facing community bankers. This opportunity provides CDD members with not only networking and attending the CDD Spring Meeting, but also participating in CBAI's 33rd Annual Capital Conference. While CBAI's Capital Conference emphasizes the legislative process, it also offers an excellent balance of learning opportunities and peer networking. Many issues vital to community banks will be on CBAI's Legislative Agenda for future sessions of the Illinois General Assembly. Your knowledge and involvement helps your bank and the community-banking profession as a whole. As a CDD Spring Meeting registrant, your fee for attending Capital Conference is included. Below is a tentative agenda of Capital Conference activities; more information will be forwarded as it is released. As a CDD Spring Meeting attendee, you may also attend one or all of the conference activities.

- 11:30 a.m. CBAI's Legislative Briefing and Luncheon  
Wyndham City Centre Hotel
- 12:15 p.m. Guest Luncheon Key Note Speaker — Illinois State Comptroller Susana Mendoza  
Legislative Briefing- Kraig Lounsberry, CBAI Senior Vice President of Governmental Relations
- 1:45 p.m. Lobbying and Group Meetings at the Capitol — Meet with your State Senators and Representatives  
State Capitol Building
- 3:00 p.m. Group Meetings with Legislators
- 5:00 p.m. CBAI's Annual Legislative Reception  
Wyndham Springfield City Centre Hotel — Pinnacle Club — 30th floor  
Heavy Hors d'oeuvres and Cocktails

## General Session Speaker Biographies

"While it's true that we brought to market an amazing online compensation and performance-management system to the banking industry that sets salary ranges and ties pay to performance, that doesn't explain the reason behind our success," says **Christie Summervill, CEO of BalancedComp** - a six-year-old start-up company. "I focus on creating a culture where quirky, brilliant, self-motivated employees use their energies to move our mission forward. I've had employees receive job offers for more than \$75,000 a year more than what I paid them, yet they choose to stay. Culture before customers is my motto. By developing a culture that fosters leadership as a priority, my clients are much better served."

**Chris Scaffidi, Director of Market Development for The Pacific Institute**, is a nationally recognized speaker who partners with organizations to develop strategies to improve employee engagement and motivation and maximize performance. Scaffidi's consulting experience also spans a variety of industries, including pre- and post-secondary education, private-sector business, the United States military, professional athletics, the federal government and social-service institutions. He has been involved in The Pacific Institute's Higher Education Initiative, which serves over 300 colleges around the United States. Scaffidi has done extensive work with the U.S Department of Labor's, office of Job Corps, helping the agency to both assess and create change readiness strategies across the nation. He received a bachelor's degree in psychology from UCLA and a master's degree from Gordon Conwell Theological Seminary.

**Chuck Bruney is CEO of Align FSC**. Bruney has nearly 30 years of experience throughout North, Central and Latin America, and Europe, assisting financial services organizations to accelerate profitability and growth. Prior to founding Align, Bruney launched and directed the strategic-consulting practices at BGS Group and IBT Enterprises. In those roles, he assisted bank, payment-systems in the completion of strategic business planning and "specialty-niche" market-segment projects. Before IBT, Bruney was senior vice president of marketing and product management at Vital Processing Services, a joint venture of Visa USA and TSYS, where he directed the company's re-branding, communications, and back-office-support product-development and product-management activities. He holds an MBA. from The Wharton School at the University of Pennsylvania and a BS in business administration from Auburn University. He is a frequent contributor to industry trade publications and considered an expert speaker on business strategies for the financial-services industry.

**Karl Nelson is the Founder and CEO of KPN Consulting**. His career has included senior positions with IDC Deposits and Promontory Interfinancial Network. In addition, Nelson served as a senior vice president with the Federal Home Loan Bank of Atlanta from 1991 through 2002 where he managed the sales and marketing, strategic planning, and trade association/regulatory outreach efforts and served on the bank's ALCO. Prior to joining the Home Loan Bank, he was involved for 18 years with various regional banks. Nelson serves on the faculties of the Graduate School of Banking in Madison, Wisconsin and Boulder, Colorado, the Graduate School of Bank Investments & Financial Management in Columbia, South Carolina, as well as the faculties of the state banking schools in Florida and Tennessee. He also serves as the chairman for Neighborhood Lending Partners, Inc, a Community Development Financial Institution serving the affordable-housing and community-revitalization needs for communities in the state of Florida.

# Thursday, April 6, Networking Session 9 - 9:30 a.m.

During this roundtable discussion, attendees have the opportunity to bring forth ideas and issues related to their positions within their banks. This is a wonderful opportunity to learn from your colleagues throughout the state. You are grouped according to the following job responsibilities: social media/marketing, consumer lending, real-estate lending, commercial lending, agricultural lending, operations, compliance, technology, and HR/management/supervision.

## General Session - 9:30 - 10:30 a.m.

### **“Developing the Next Generation of Community Bank Leaders” Christie Summervill, BalancedComp**

Christie Summervill, CEO of BalancedComp, a compensation and performance-management consultancy for banks, is passionate about developing emerging, enduring, and experienced leaders and teaching them how to develop using a disciplined and deliberate approach. Real leadership principles are timeless and apply across all spectrums of life. Leadership starts with a condition of the heart — the desire and passion to make a difference before it moves to the brain to breathe life into a plan. It is an inside-out process and is shaped by your values, character, choices, opportunities, experiences, and worldview. Leadership is about you, the people you influence, and a belief that you can make a difference and have a significant impact on something bigger than yourself. In this interactive session, Summervill will walk you through a step-by-step approach to ensure you live up to your specific potential of greatness.

## General Session - 10:45 - 11:45 a.m.

### **“Accelerate Your Bank’s Performance” Chris Scaffidi, Director of Market Development, The Pacific Institute**

“Human Beings are perfectly designed to get the results they are currently getting.” In the perspective of a bank, until we accelerate the thought patterns around our current performance, we make it much harder to accelerate the performance itself. While leadership sets the tone for accelerated performance, every individual in the organization contributes to the ultimate success in achieving new goals. This session helps attendees understand their organization's readiness to accelerate performance goals and achieve results, and see how the organization's vision and values become the centerpiece for driving toward specific performance metrics.

## Business Meeting Luncheon - 11:45 - 1 p.m.

The Annual Business Meeting includes reports from CDD officers on membership and financial issues as well as the results of the recruitment campaign. Enjoy time during the luncheon to meet with fellow CDD members for informative roundtable discussion on issues that are affecting your community bank.

## General Session - 1 - 2 p.m.

### **New Customer Onboarding & The Omni Channel Experience - How to Maximize Retention & Accelerate Wallet Share**

#### **Chuck Bruney, Founder & CEO, Align FSC**

Times have changed and retail banking is being disrupted. We must now engage consumers through relevant conversation, reaching them in ways unlike before. Consumers want less friction in managing daily finances and in reaching goals. Human interaction and technology driven experiences will drive the banking evolution. This session provides a clear picture of how banks must view the modern consumer, why we must evolve, and how to remain relevant in the life of your customer.

## Closing General Session - 2 - 3 p.m.

### **“Why Banks Should Re-Focus on Culture” Karl Nelson, Founder & CEO, KPN Consulting**

It's a common definition: “Culture is the shared beliefs and values guiding the thinking and behavior of the organization.” But do you have the right organizational culture to take you into the future? This session helps attendees determine the type of culture currently present in their banks and chart a strategic path toward designing a culture for the bank's future strategy.

**REGISTER BY MARCH 1 AND YOUR NAME WILL BE INCLUDED IN A DRAWING FOR \$100!**

# REGISTRATION - CDD SPRING MEETING & CAPITAL CONFERENCE

## APRIL 5-6, 2017 WYNDHAM CITY CENTRE, SPRINGFIELD

Name of Institution/Firm: \_\_\_\_\_

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

City/State/Zip: \_\_\_\_\_

Name/Title: \_\_\_\_\_

E-mail: \_\_\_\_\_  Yes, I will attend the Capital Conference Luncheon  
 Yes, I will attend the Capital Conference Lobbying at the Capital  
 Yes, I will attend the Capital Conference Reception

Name/Title: \_\_\_\_\_

E-mail: \_\_\_\_\_  Yes, I will attend the Capital Conference Luncheon  
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### Please select your payment method.

Check Enclosed       Check in Mail       Credit Card\* (Visa, MasterCard, Discover Only)

*\*If you are paying by credit card, please fill out the following information.*

Name It Reads on Card \_\_\_\_\_ Card Number \_\_\_\_\_

Company Name on Card \_\_\_\_\_ Expiration Date \_\_\_\_\_

Security Code \_\_\_\_\_ Billing Address of Card \_\_\_\_\_

I have special needs or dietary restrictions, please contact me before the seminar

**RETURN THIS REGISTRATION FORM TO:** Career Development Division, Community Bankers Association of Illinois,  
901 Community Drive, Springfield, IL 62703-5184 or fax form to 217/585-8738.

### CDD MEMBERS

One Person \$279  
Two or more from the same institution \$259 each

**NON-CDD MEMBERS** \$429\*

**\*You may qualify for a discounted rate for this meeting and CDD membership. Contact Melinda McClelland for more details.**

#### FOR MORE INFORMATION CALL:

Melinda McClelland, vice president,  
Department of Education & Special Events  
800/736-2224 FAX: 217/585-8738

**Each participant will receive a take-away toolkit that includes a bullet-point write-up and talking points of the general sessions for bankers to provide follow-up information to their management.**

**MEETING REGISTRATION FEES** include customized training programs, refreshments breaks, and lunch. An income-tax deduction may be allowed for educational expenses undertaken to maintain or improve professional skills. Registrants cancelling two days prior to the seminar will receive 100% less than two days, 50% refund; the day of the seminar, no refund. **All cancellations must be made in writing to Melinda McClelland.**

**CONFERENCE HOTEL** is the **Wyndham City Centre, (formerly the Hilton Hotel)** 700 E Adams St, Springfield, IL 62701. **A block of rooms has been reserved for "Community Bankers of IL - CDD" participants and reservations can be made by calling 217/789-1530 to make that reservation. When calling, please have a credit card ready so the reservation can be confirmed.** To ensure availability, reservations should be made by March 15. The room rate is \$113 plus tax and parking for a single or double occupancy.