Wednesday, May 14th, 2014
9:00 am-12:00 pm

Pre-Conference Sessions

- Affordable Homeownership Roundtable
- CDFI Clinic: CU Breakthrough Consultations
- Communicating Arts Credit Union Site Visit and Tour (9:30 AM-11:30 AM)

12:00 pm
Lunch

Welcome: Michael Duggan, Mayor of Detroit

12:30 pm-2:00 pm
Opening Plenary

LMI Trends and the Opportunities They Present for Credit Unions Through 2020
- Patrick Adams, CEO, St. Louis Community Credit Union
- Rita L. Haynes, CEO Emeritus, Faith Community United Credit Union
- Jonathan Morduch, Professor of Public Policy and Economics, New York University

2:00 pm-3:30 pm
Early Afternoon Workshops

Track 1: Insights: Keeping Up with Evolving Member Expectations
Moderator: Clarissa Ritter, Director of Marketing and Communications, Federation
- Richard Campbell, CFO, Hope Credit Union
- Steve Zuckerman, Executive VP, Self Help Federal Credit Union

Track 2: Innovation: Scalable Products for LMI Members
Moderator: Cynthia Campbell, Director of Innovation Labs, Filene Research Institute
- Mark Lynch, Credit Union Consultant, National Credit Union Foundation
- Jose Miranda, Innovation Manager, Neighborhood Trust Federal Credit Union
- Dave Prosser, VP, Freedom First Credit Union

Track 3: Compliance & Capacity Building: Developing a Non-Profit Affiliate
Moderator: Pablo DeFilippi, VP of Membership and Business Development, Federation
- Sheila Schat, Consultant, CU Breakthrough
- Neil Stevenson, Senior Staff Attorney, Lawyer's Alliance

Special Session: Cultivating New and Emerging Leaders within the CDCU Movement
Moderator: Pamela Owens, VP of Programs, and Jason Chang, Program Associate, Federation
- Monique Dunbar, Cooperative Finance Leader of America Fellow at Credit Union of Atlanta
- Ash Exantus, Cooperative Finance Leader of America Fellow at Urban Upbound Federal Credit Union
- Lauren Hudson, Cooperative Finance Leader of America Fellow at Bethex Federal Credit Union
- Lila Phimmasone, Cooperative Finance Leader of America Fellow at Genesee Co-op Federal Credit Union
- Preeya Saikia, Cooperative Finance Leader of America Fellow at Fidelis Federal Credit Union

3:30 pm-4:00 pm
Exhibitor Break

4:00 pm-5:30 pm
Late Afternoon Workshops

Track 1: Insights: The Impact of Financial Counseling Through Credit Unions
Moderator: Ann Solomon, Strategic Initiatives Manager, Federation
- Karen Casler, Financial Counseling Manager, CASE Credit Union
- Amber Paxton, Director, Financial Empowerment Center
- Justine Zinkin, CEO, Neighborhood Trust Financial Partners

Track 2: Innovation: Next Wave Financial Management Tools
Moderator: Blake Myers, Consultant, Federation
- Francisco Cervera, Co-Founder & CEO, eMoneyPool
- Sherod Halliburton, CEO, Manatee Community Federal Credit Union
- Jonathan Harrison, CEO, Emerge
- Ian Lampl, Co-Founder & CEO, Loan Street

Track 3: Compliance & Capacity Building: Reflections from Funders on Funding Directions
Moderator: Terry Ratigan, Senior Development Consultant, Federation
- Amy Brown, Program Officer, Ford Foundation
- Benita Melton, Program Officer, Mott Foundation
- Bill Myers, Director, Office of Small Credit Union Initiatives, National Credit Union Association
Thursday, May 15th, 2014
8:00 AM

Special Session- National Cooperative Bank Workshop: Financing Co-ops
Moderator: Eben Sheaffer, CFO, Federation
- Casey Fannon, Senior VP, National Cooperative Bank

6:00 PM - 7:30 PM
Reception
Diego Rivera Court, Detroit Institute of Arts

8:00 AM

Special Session- Development in Detroit
- David Carroll, VP of Miscellaneous Stuff, Quicken Loans

9:00 AM - 9:45 AM
Empowering Americans to Build Their Financial Security
- Michael S. Barr, Professor of Law, University of Michigan

10:00 AM - 11:30 AM
MORNING WORKSHOPS

Track 1 - Insight: The Role of Predictive Analytics
Moderator: Clarissa Ritter, Director of Marketing and Communications, Federation
- Cynthia Campbell, Director of Innovation Labs, Flene Research Institute
- Scott Graffius, Direct Marketing Analytics Manager, Credit Union National Association Mutual Group
- Jay Nadboralski, Senior Manager, Credit Union National Association Mutual Group

Track 2 - Innovation: Integrating Financial Services into Social Service Delivery
Moderator: Tanya Ladha, Manager, Advisory Services, Center for Financial Services Innovation
- Gregg Brown, President/CEO, Southside Community Federal Credit Union
- Jeannine Esposito, Communications and Development Associate, Self Help Federal Credit Union
- Margaret Libby, Executive Director, Mission SF Community Financial Center
- Ayom Siengo, Manager of Economic Development, The Community Builders
- Paul Woodruff, VP of Community Development, St. Louis Community Credit Union

Track 3 - Compliance & Capacity Building: Regulatory Updates and Current Issues from National Credit Union Association
Moderator: Jamie Howell, Compliance Consultant, Credit Union Solutions Group
- Larry Schoebert, Supervision Analyst, National Credit Union Administration
- Jason Schultz, Consumer Access Analyst, National Credit Union Administration
- David Sieminski, Policy Analyst, Consumer Financial Protection Bureau

Special Session- CDCU Risk Institute: Risk Management for Small and Faith-Based Credit Unions
Moderator: Pamela Owens, VP of Programs, Federation
- W. Kent Hartzler, Everence Federal Credit Union
- Mark A. Regier, Everence Financial

12:00 PM
Lunch

12:00 PM - 12:30 PM
Special Presentation
- Mary Dunn, Senior VP and Deputy General Counsel, Credit Union National Association
- Janet B. McDonald, Senior Sales Market Manager, CUNA Mutual Group

12:30 PM - 1:30 PM
Lunch plenary

- Deyanira Del Rio, Co-Director, New Economy Project
- Ann Baddour, Senior Policy Analyst, Texas Appleseed
- Luis Pastor, CEO, Latino Community Credit Union

1:30 PM - 2:00 PM
Exhibitor Break

2:00 PM - 3:30 PM
AFTERNOON WORKSHOPS

Track 1 - Insights - The Power of State CDFI Coalitions
Moderator: Hank Hubbard, CEO, Communicating Arts Credit Union
- Tristram Coffin, CEO, Alternatives Federal Credit Union
- Seth Julyan, VP Membership, Opportunity Finance Network

Track 2 - Innovation: Core Banking and the Needs of the LMI Market
Moderator: Mignhon Tourne, CEO, ASI Federal Credit Union
- Kevin Burke, Director of IT, ASI Federal Credit Union
Track 3 - Compliance & Capacity Building: Red Flag Warnings - What Every CEO Should Know
Moderator: Pamela Owens, VP of Programs, Federation
- Robin Romano, CEO, MariSol Federal Credit Union

Special Session - CDFI Certification - Building Blocks of Sustainable Growth
- Pablo DeFilippi, Director of Membership, Federation
- Terry Ratigan, Senior Development Consultant, Federation

Friday, May 16th, 2014
8:00 AM
Regional Caucuses

6:00 PM - 7:30 PM
Reception

4:00 PM - 5:00 PM
Track 3 - Compliance & Capacity Building: Red Flag Warnings - What Every CEO Should Know
Moderator: Pamela Owens, VP of Programs, Federation
- Robin Romano, CEO, MariSol Federal Credit Union

8:00 AM
Breakfast

8:30 AM - 9:00 AM
Special Presentation: Dennis Nolan, Acting Director, Community Development Financial Institutions Fund

9:00 AM - 10:30 AM
Morning Plenary

The Financial Lives of Low-Income Consumers
- Alex Horowitz, Research Manager, The Pew Charitable Trusts
- Kirsten Moy, Director of Scale Initiatives, Aspen Institute
- Lisa Servon, Professor, The New School for Public Engagement

10:45 AM - 12:00 PM
Morning Workshops

Track 1 - Insights: Behavior-Driven Asset Building Strategies
Moderator: Clarissa Ritter, Director of Marketing and Communications, Federation
- Jessica Demorest, Product Coordinator, CU Solutions Group
- Shira Markoff, Senior Program Manager, CFED
- Dana Perantie, Project Manager, Washington University, St. Louis

Track 2 - Innovation: Meeting the Financial Needs of Immigrants
Moderator: Gregory Schiefelbein, Senior VP, Citi Community Development
- Jason Chang, Program Associate, Federation
- Sarah Marshall, Marketing and Partnerships Manager, North Side Community Federal Credit Union
- Winona Nava, CEO, Guadalupe Credit Union
- Marisabel Torres, Policy Analyst, National Council of La Raza

Track 3 - Compliance & Capacity Building: Ramping Up Your Lending
Moderator: Eben Sheaffer, CFO, Federation
- Richard W. Guillot, CEO, Business Alliance Financial Services
- Randy Thompson, CEO, Thompson Consulting and Training

12:00 PM - 1:00 PM
Business Meeting

1:00 PM - 2:30 PM
Annie Vamper Awards Luncheon
Awardee: Rita L. Haynes, CEO Emeritus, Faith Community United Credit Union

3:00 PM
Conference Adjourned