

## Diverse Employees, Diverse Members: Connecting Inclusive Marketing and Equitable HR in Credit Unions

**REGISTER** 

Austin, TX • September 26, 8 a.m. – September 27\*, 1:00 p.m. (\*Special announcement at 12:15pm)

Register at: [filene.org/ConnectTheDots](https://filene.org/ConnectTheDots)

Diverse employee teams make for a clear business advantage, in part because they are better equipped to understand and serve a diverse membership. But the challenge lies in translating recognition of the value of diversity into inclusive actions and equitable outcomes.

In this event, attendees will learn how HR and marketing can join forces to put the equity and inclusion in diversity and how these efforts can foster mutually beneficial and mutually reinforcing experiences for both credit union staff and members.

Leading academics and industry thought leaders will provide insight into how DEI can be used to align your approach to recruiting, retaining, and developing top performers with your member outreach and engagement strategy in ways that will deepen connections to your community while growing your membership, mission, and impact.



### Hosts

- Sekou Bermiss, Filene Fellow: War for Talent + Professor, University of Texas at Austin
- Hope Schau, Filene Fellow: Consumer Decision Making + Professor, University of Arizona

### Keynote Speakers and Presenters:

- David Crockett, University of South Carolina
- Leonard Moore, University of Texas at Austin
- Quinetta Roberson, Villanova School of Business
- Kenia Calderón, Coopera
- Ruth Cochran, Korn Ferry
- Monica Hughes Davy, National Credit Union Administration (NCUA)
- Elle Forster, Leesman
- Lynn Heckler, PSCU
- Samira Salem, Credit Union National Association (CUNA)
- Eric Hansing, CUNA Mutual Group
- Angela Russell, CUNA Mutual Group
- Renée Sattiewhite, African American Credit Union Coalition (AACUC)

**Day 1 - Thursday, September 26:**

8:00-9:00	Breakfast
9:00-9:30	Introductions, Sponsor Messages
9:30-10:00	<b>Keynote:</b> Leonard Moore, University of Texas at Austin, <i>“Managing Diversity and Inclusion in the Age of Trump”</i>
10:00-10:15	<b>Presentation:</b> Angela Russell and Eric Hansing, <i>“Tapping into the power of difference – CUNA Mutual’s Journey”</i>
10:15-10:45	<b>Panel Discussion:</b> Sekou Bermiss + Leonard, Angela and Eric
10:45-11:00	Break
11:00-11:30	<b>Keynote:</b> David Crockett, University of South Carolina, <i>“Diversity, Equity, and Inclusion in Financial Services: Challenges and Strategies for CUs”</i>  <i>An overview of financial services in communities of color, and the challenges credit unions face in providing services to these market segments.</i>
11:30-11:45	<b>Presentation:</b> Kenia Calderón, Coopera, <i>“Is Your Credit Union Ready to Welcome Me?”</i>  <i>How receiving an Individual Taxpayer Identification Number (ITIN) microloan helped support a high-performing college student succeed.</i>
11:45-12:15	<b>Panel Discussion:</b> Hope Schau + David and Kenia
12:15-1:15	Lunch
1:15 – 3:15	<b>Showcase presentations:</b> <i>On the state of DEI in the CU industry, featuring Monica Hughes Davy (NCUA), Lynn Heckler (PSCU), Samira Salem (CUNA), Renée Sattiewhite (AACUC), Hope Schau, Sekou Bermiss and more!</i>
1:15 – 2:00	<b>Showcase Presentations #1</b>
2:00 – 2:15	Break
2:15 – 3:00	<b>Showcase Presentations #2</b>
3:00 – 3:15	Break
3:15 – 3:45	<b>Panel Discussion</b> and wrap-up
3:45 – 5:00	<b>Reception:</b> <i>Connect the Dots and Register for Classes</i>  <i>Opportunity to meet and talk with presenters: Hope Schau, David Crockett, Kenia Calderón, Ruth Cochran, Angela Russell, Eric Hansing, and more.</i>

## Day 2 - Friday, September 27:

7:30-8:30	Breakfast
8:30-8:45	Introductions, Sponsor Messages
8:45-10:15	<b>Teaching Rounds</b> (breakouts): <ul style="list-style-type: none"><li>• <b>Sekou Bermiss:</b> <i>“Difficult Conversations in the Workplace”</i> <i>Communicating about diversity, equity and inclusion can be challenging in the workplace. Learn strategies to move your organization towards inclusion without alienation.</i></li><li>• <b>Hope Schau:</b> <i>“We Belong: Building Diversity and Inclusion Throughout the Credit Union Enterprise”</i> <i>Learn how credit unions can enhance their messaging and representation to attract and retain diverse members and talent.</i></li><li>• <b>Leonard Moore:</b> <i>“Managing Diversity in the C-Suite”</i> <i>An approach for executive leaders on best practices for Diversity and Inclusion.</i></li><li>• <b>David Crockett:</b> <i>“Put your Brand Strategy to Work for a More Diverse Membership”</i> <i>A deeper dive into brand level strategy that incorporates diversity, equity, and inclusion toward growing your membership.</i></li></ul>
10:15-10:30	Break
10:30-11:30	<b>Presentation:</b> Elle Forster, <i>“Workplace Design and DE&amp;I”</i>  <i>Elle Forster covers key findings from the Leesman Global Database, revealing a series of mission-critical drivers organizations need to deliver if they are to foster outstanding employee workplace experience. Based on a new research collaboration between Filene, Momentum, and Leesman, participants will dive deep into how employee’s satisfaction and support in their workplace experience can impact their performance in their day-to-day work.</i>
11:30-11:45	Break
11:45-12:15	<b>Presentation:</b> Ruth Cochran, Korn Ferry, <i>“Women in Leadership in the CU Industry”</i>  <i>What are some systemic challenges that women face when working to advance their careers in the credit union space? What can be done to better support women as they develop as credit union leaders?</i>
12:15 - 12:45	<b>*Special Keynote*</b> Quinetta Roberson, Villanova University
12:45 – 1:00	Wrap up

