



# Expand EXPO 2024

HERSHEY  
Lodge 

September 8 - 12, 2024

Expand Your Knowledge

Expand Your Network

Expand Your Possibilities

Full-Day Workshops on topics designed to increase performance, including:

Bankruptcy  
Collections  
Communication  
Critical Thinking

Leadership  
Lending  
Member Experience  
Personal Development

Featured Workshop

A Culture of Service:  
Building Success From Within

Presented by  
The Ritz-Carlton  
Leadership Center

10 Expert Facilitators and Presenters, featuring:



Don Arkell



Jordan Harrison



Christy Jones



Dr. Tracey Jones



Rosemary Laack



Kelli Vrla

\$999 per person  
Early-Bird Special  
\$799 per person if registered  
by June 2, 2024

Expand Expo is proudly presented by our event sponsors:



# About Expand Expo

**Expand Expo** was created in 2018 to provide credit union professionals with a training and development experience on topics that directly increase performance and contribute to the success of their credit union. Unlike other conferences offering 45-60 minute breakout sessions that merely scratch the surface, our full-day workshops enable participants and presenters to take a deep-dive into topics providing actionable steps which can be applied the day they return to their credit union.

Last year's event at the Hershey Lodge attracted 168 credit union professionals, representing 67 different credit unions from 18 states.

Recharge and refuel with meals and snacks throughout the week, which are included with paid registration to Expand Expo. Each day, a hot themed lunch buffet will be served from 12:00pm - 1:00pm. Engage with other attendees during networking breaks Monday - Wednesday. Unwind during our cocktail receptions Sunday and Monday evenings, which will feature a limited open bar and heavy hors d'oeuvres. Enjoy our Wednesday evening dinner with live entertainment from The Killer Pianos.

Stay at the Hershey Lodge to enjoy a complimentary hot breakfast buffet each morning and access to all their amenities, including spa, fitness center, bars and restaurants, pool, and arcade. Rooms at the luxurious Hershey Lodge are only \$169 per night.

Register now and take advantage of the early-bird pricing, just \$799 when you register by June 2. Normal registration is \$999 per person after June 2. Register through our website [www.ExpandExpo.org](http://www.ExpandExpo.org) or by completing and mailing the registration form on page 16.

Visit our website [www.ExpandExpo.org](http://www.ExpandExpo.org) for more information.

## What Expand Expo 2023 Attendees Said About the Event

*I have been having conversations with my peers around the conference and how much I got out of it. All of the sessions I attended all connected to close the loop on the last day. Great change in making it an all-day session to really get the content that I was looking for.*

- Jaquelin Herd; Contact Center Manager, Rivermark Community Credit Union - Beaverton, Oregon

*I really loved it! I liked that it was all in one convenient location, food was provided, and the selection of classes to choose from was wide and intriguing (it was hard to make a decision!). The teachers were engaging and informative. I definitely want to come back.*

- Kim Ritter; Home Center Manager, Alternatives Federal Credit Union - Ithaca, New York

*The information we got there was priceless. It was an incredible opportunity to be able to attend this year!*

- Jake Reynolds; Marketing Specialist, Grove City Area Credit Union - Grove City, Pennsylvania

*Excellent conference, amazing opportunities to network. We will definitely be back!*

- Brenda Raker; CEO, Pinpoint Federal Credit Union - Milton, Pennsylvania

# Thursday's Featured Workshop

## A Culture of Service: Building Success From Within presented by The Ritz-Carlton Leadership Center

We are excited to welcome The Ritz-Carlton Leadership Center back to Expand Expo as they present **A Culture of Service: Building Success From Within**. Employee mindset has everything to do with whether your business survives or thrives because engaged employees create engaged and loyal members.

The Ritz-Carlton Leadership Center, an award-winning employment brand, shares best practices on how to activate and sustain a culture where valued and empowered employees own the member experience. Their world-renowned, trusted processes take the guesswork out of selection, onboarding, upskilling, and retention of talent. Leaders ready to transform their organization will walk away with actionable ideas to elevate experiences and engage employees.

Topics include:

**The Ritz-Carlton Culture:** Through this in-depth review, you will learn about The Credo, Motto, The Three Steps of Service, The Employee Promise, and The 12 Service Values of The Ritz-Carlton.

**Simple, Sustainable Processes:** One cannot extend legendary service without having robust systems and processes in place. You will hear about the selection process at The Ritz-Carlton and how they onboard talent and reward and recognize their associates.

**Employee and Customer Engagement:** The foundation of driving customer engagement is having engaged employees. You will be introduced to the three levels of employee engagement and shown techniques that will enable you to personalize your service and create emotional connections.

**The Importance of Empowerment:** Empowering your employees is an imperative component of legendary service. You will learn about The Ritz-Carlton Empowerment Guidelines and how they reduce problem resolution costs and create consistently exceptional service.

For over two decades, The Ritz-Carlton Leadership Center has leveraged the systems and processes of The Ritz-Carlton brand to deliver award-winning services that have allowed thousands of clients to improve customer and employee engagement, innovate their culture, and differentiate themselves.

Their methodology is rooted in the legendary Gold Standards of The Ritz-Carlton and the practices and processes that have allowed them to win two Malcolm Baldrige Awards, becoming the first and only hotel to do so. Through organizational transformation and application of their best practices, their business continues to deliver some of the biggest launches, innovations, and transformations worldwide.



### Early Bird Registration is Now Open!

\$799 per person through June 2, 2024

\$999 per person after June 2, 2024

Register today at  
[www.ExpandExpo.org](http://www.ExpandExpo.org)

# Discover the Training

## Collections Topics

### Bankruptcy

presented Tuesday by Christy Jones

Learn the differences between Chapter 13 and Chapter 7 cases, what circumstances lead our members to file bankruptcy, and ways in which credit union staff can avoid unnecessary losses. This class heavily focuses on some of the common forms and how to fill them out. We will practice filling out Proofs of Claims that are necessary in Chapter 13s, and how to preserve the credit union's right to exercise cross-collateralization. Attendees will receive multiple timelines, and sample Chapter 13 and Chapter 7 cases, from the filing of the petition to the dismissal or discharge of each case. Bankruptcy topics discussed during the introductory track include:

- Differences between Chapter 13 and Chapter 7.
- Automatic Stay.
- Reaffirmation agreements.
- Cram Down rules on automobiles and mortgage liens.
- Loss mitigation efforts.
- Continuing impact of the pandemic on bankruptcy.
- Repossession form letters.

### Collections

presented Monday by Christy Jones

Explore all the hallmarks of successful collection efforts, including how procedures must conform to regulations to ensure proper notice and completion of collection forms. Collections and foreclosure topics discussed during the introductory track include:

- Identify the hallmarks of necessary and successful compliance procedures.
- Effective and compliant collection calls and letters.
- Repossession form letters.
- Collection compliance, including Servicemembers' Civil Relief Act and The Fair Debt Collections Practices Act.
- Current trends in collections.

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## Communication Topics

### Constructive Conversations - A Guide to Giving and Receiving Feedback

presented Tuesday by Rosemary Laack

Constructive feedback is a vital tool to improve performance, boost productivity and engagement, and achieve better results. While the benefits of feedback are well-known, many leaders struggle with how to effectively give and receive feedback. Join us for this engaging workshop, where you will learn to produce more constructive conversations in the workplace. Topics include:

- Learn how to effectively give and receive feedback.
- Gain essential skills for having constructive conversations, enhancing communication, and improving relationships in both personal and professional contexts.
- Discover the art of fostering a culture of improvement and strengthening professional relationships through the exchange of feedback.
- Practice active listening techniques for empathetic communication.
- Provide constructive feedback that encourages growth and improvement.
- Receive feedback gracefully and use it as a catalyst for personal and professional development.

# Discover the Training

## **Unleash Your Inner Presenter: Tapping Back Into the Art of Dynamic and Engaging Presentations**

presented Monday by Michael Leone

Welcome to the grand stage of everyday life, where every interaction is a performance, and you're the star! Whether it's a boardroom showdown, a virtual meeting marathon, or a casual chat by the water cooler, you're always in the spotlight. So, why not make every moment count? In this thrilling, interactive journey, we invite you to rediscover the best version of yourself at work. We're not just talking about presentations; we're talking about transforming the way you communicate, influence, and inspire. Here's a sneak peek of what you'll be doing:

- Uncover the secret sauce to being unforgettable: Learn the art of captivating your audience, sparking change, and leaving a lasting impression. No more yawns, only applause!
- From Ordinary to Extraordinary: Tap into your unique experiences and transform your presentations from monotonous to mesmerizing. Say goodbye to the mundane and hello to the extraordinary!
- Storytelling Magic: Discover how to weave compelling narratives that will keep your audience on the edge of their seats. Turn "Snore" into "Encore" with the power of storytelling!
- And much more!

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## Leadership Topics

### **Creating a Competitive Advantage - How to Anticipate, Strategize, and WIN!**

presented Wednesday by Sarah Shirck

The first step towards innovative thinking is to create space and dedicate time to exploring the art of what's possible. To truly grow, organizations must not only create this space, but also be willing to be critical and introspective. By identifying the credit union's weaknesses, internal factors, and external realities, participants will walk away with short and long-term priorities that support the organization's growth and evolution. This workshop takes an unconventional approach to identify your company's vulnerabilities and support you - through facilitation - in anticipating, solutioning, and prioritizing opportunities for improvement. Topics include:

- Develop a critical framework for evaluating your credit union.
- Explore how competitors could gain or take market share based on the vulnerabilities of your credit union.
- Prioritize your credit union's threats and weaknesses.
- Develop strategies to combat potential market threats.
- Brainstorm and create Change Management strategies.

### **Critical Thinking**

presented Tuesday by Dr. Tracey C Jones

Critical thinking skills are valuable in every role of your credit union. These skills enhance communication, creativity, and problem-solving. The ability to think critically enables you to develop ideas and solve complex issues. This tailored course structure will equip credit union professionals with critical thinking skills essential for addressing challenges and making strategic decisions in their industry. Topics include:

- Develop a solid understanding of critical thinking and its relevance in the credit union industry.
- Improve your ability to identify and analyze problems, make informed decisions, and assess risks.
- Gain techniques to foster creativity and innovation in credit union operations.
- Enhance your communication and collaboration skills in critical thinking scenarios.
- Be prepared to apply critical thinking skills effectively in your role, contributing to the success of your credit union.

# Discover the Training

## Leadership Topics (Continued)

### **Foundations of Leadership - Understanding Personal Leadership Styles**

presented Tuesday by Jordan Harrison

There is no one-size-fits-all approach to leadership. Leadership is formed by identity, environment, need, and the challenge being addressed. This session will help participants understand the fundamental principles of leadership, recognize their own leadership style, and explore additional elements of leadership that can inform their personal practice. Participants will craft their unique leadership style and explore ways to enhance their definitions and applications of leadership in their context.

- Explore and understand the six styles of leadership.
- Recognize your strengths and weaknesses, and how they impact your team.
- Understand leadership biases.
- Create your personal definition of leadership, and define what values are core to your unique leadership style.

### **How Leaders Inspire, Influence, and Achieve Results**

presented Wednesday by Eric Herdman

The ability to inspire, influence, and achieve results is a skill that all leaders need to be successful. Learn how to take charge, build trust and loyalty, and win support by being authentic in your communication. Delve into leadership strategies that inspire and influence others while achieving outstanding results. This course covers leadership styles, vision setting, and team motivation. Topics include:

- Develop a compelling vision and strategy for your team or organization.
- Inspire and motivate team members to achieve common goals.
- Effectively communicate your leadership message to diverse audiences.
- Measure and evaluate results, and adapt leadership strategies accordingly.

### **Influence of Leadership: Multiplying the Impact of Teams**

presented Wednesday by Jordan Harrison

Work is not done in silos. It is through high-performing teams that the most innovative, creative, and successful businesses work. This workshop will train participants on the key elements of driving effective teams for high performance. Participants will understand the psychology of psychologically safe teams and how to create high performance through their leadership style. Topics include:

- Explore the actions and behaviors that lead to multiplier production from the workforce, as well as those that diminish your team's output.
- Recognize and adjust coaching styles based on the needs of others.
- Utilize the SBI method to embrace up/down feedback and give it consistently to others.

### **Leadership Ethics for Credit Union Professionals**

presented Monday by Dr. Tracey C. Jones

This course will provide credit union professionals with the ethical leadership skills needed to lead with integrity and navigate the complex ethical challenges within the credit union industry. Topics include:

- Acquire knowledge about various ethical leadership models and how to apply them in your role.
- Enhance your ethical communication skills and promote transparency within your organization.
- Improve your ability to make ethical decisions, resolve conflicts, and navigate member relations ethically.
- Be prepared to lead ethically in a changing credit union landscape - one with emerging technologies and innovations.



# Discover the Training

## Resilient Leadership Essentials

presented Monday by Kelli Vrla

In today's ever-evolving and unpredictable business landscape, the ability to adapt and thrive in the face of adversity is a hallmark of great leadership. This course helps leaders explore the core essentials of resilient leadership. It teaches them to adapt to change, inspire teams, and foster resilience in themselves and their organizations. Topics include:

- Develop resilience and adaptability as a leader.
- Build a resilient and motivated team in times of uncertainty.
- Communicate change effectively and manage resistance.
- Foster a culture of continuous learning and growth.
- Lead by example and inspire others to overcome challenges.

## Lending Topics

### Consumer Lending

presented Monday and Tuesday by Don Arkell

If you are involved in the lending process at your credit union, you won't want to miss this workshop. Don Arkell is a sought-after trainer and consultant. This engaging and entertaining session will empower you to make great loan decisions and earn more of your members' business. Topics include:

- What must happen in every loan interview.
- Gain more of your members' business.
- Spot three bankruptcy predictors, and learn how to deal with them.
- Break out of the lending boxes that bind you.
- Increase sales of ancillary products.

### Decisioning in Risk-Based Lending

presented Monday by Dr. Randy Thompson

This course will examine effective methods of correctly identifying and quantifying costs for each loan type, and create rates that are fair to both the member and the credit union. We will review how effective risk-based pricing addresses and minimizes expended risk and enhances returns on loans. We will also examine how profitability is enhanced through effective cost-based pricing. Topics include:

- Expand your knowledge and understanding of the components of credit risk.
- Analyze the comprehensive costs associated with your lending activities.
- Explore the relationship between loan risk grades and acceptable loans rates and margins.
- Learn how to measure and minimize "expended risk."
- Create loan pricing strategies for various loan types and grades.

### Effective Loan Management

presented Wednesday by Dr. Randy Thompson

Underwriting, funding, and documenting loans is only about 50% of the job of a loan department. Once a loan is on the books the other 50% begins. This course will explore the ways in which loan staff can minimize risk, reduce losses and actually empower marketing efforts to continually grow the loan portfolio. We will look at Credit Migration, what it is and how it can be applied in Portfolio Management in the ongoing management of loans. We will demonstrate how effective Portfolio Management techniques may significantly reduce losses and create a ripple effect with RAO and ACL.

- Meet Ruth, Henry, Liz, and John and learn how they affect credit risk in your loan portfolio.
- Create strategies to identify rising risks and take early action to manage them.
- Create strategies to identify emerging loan opportunities in your portfolio and increase loan performance.
- Apply portfolio management techniques to control losses and minimize ACL exposure.

# Discover the Training

## Lending Topics (Continued)

### Effective Risk-Based Pricing

presented Tuesday by Dr. Randy Thompson

According to NCUA Guidance Letter 174, "the key to effective risk-based lending is to ensure that prices (rates) correctly reflect the risk and costs involved in each loan." In this course we will examine effective methods of correctly identifying and quantifying costs for each loan type and then create rates that are fair to both the member and the credit union. We will review how effective risk-based pricing addresses and minimizes expended risk and enhances returns on loans. We will also examine how profitability is enhanced through effective cost-based pricing.

- Expand your knowledge and understanding of the components of credit risk.
- Analyze the comprehensive costs associated with your lending activities.
- Explore the relationship between loan risk grades and acceptable loan rates and margins.
- Learn how to measure and minimize "expended risk."
- Create loan pricing strategies for various loan types and grades.

### Strategic Lending for Lending Managers

presented Wednesday by Don Arkell

In this course you and your management team will learn the tactics and strategies of top-performing credit unions around the country. This course is educational, entertaining, and will accelerate your lending results to higher levels!

Topics include:

- Overview of the competitive landscape and disruptive lenders.
- Organizing your Lending Department.
- Developing a lending sales culture.
- Improving your credit union's ROA through lending.
- How to grow your direct auto portfolio.
- And more.

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## Member Experience and Personal Development Topics

### The Art of Persuasion - Influencing without Authority

presented Monday by Rosemary Laack

Influence is a crucial skill that can help you achieve desired outcomes, even when you don't have direct authority at your credit union. The ability to win respect, influence people, and cultivate cooperation is absolutely essential to career success. Explore the psychology of persuasion and learn how to influence others effectively, even without formal authority. This course focuses on persuasive communication, negotiation, and building rapport. Topics include:

- Master persuasive communication techniques.
- Understand the principles of negotiation and conflict resolution.
- Build rapport and trust with colleagues and stakeholders.
- Identify and address objections and resistance.
- Develop a persuasive communication plan for specific situations.



# Discover the Training

## **Creating Jaw-Dropping Member Experiences**

presented Monday by Eric Herdman

Engaging and delighting your members will result in growth and boost your bottom line. Rapport-building is the key to exceeding the evolving expectations of your members. Learn how to sharpen your skills to enhance member relations. Leave with quick & easy, hit-the-ground-running techniques to provide Jaw-Dropping service! Topics include:

- Define and develop custom strategies for Jaw-Dropping Service Excellence.
- Establish and understand who your member really is, both internally and externally.
- Create a Win/Win/Win strategy to delight your members.
- Manage even the hardest-to-please members.

## **From Chaos to Calm - Stress Management Strategies for Success**

presented Wednesday by Rosemary Laack

Work can be stressful. We consistently strive to do more with less, manage multiple projects at once, and meet hefty goals with tight deadlines. The bottom line is that your ability to manage stress can make a huge difference in your success at work and happiness in your personal life. This course provides practical techniques for staying calm, focused, and productive, even in high-pressure situations. Topics include:

- Identify stressors and their impact on your physical and mental health.
- Practice mindfulness and relaxation exercises to alleviate stress.
- Develop time and task management skills to regain control in chaotic situations.
- Build a support network and engage in self-care practices.
- Implement strategies for maintaining a healthy work-life balance.

## **Mastering Resilience - Building Adversity Intelligence at Work**

presented Tuesday by Eric Herdman

One of the few constants in the credit union industry is change. Your ability to adapt to change and be resilient to challenges and adversity is the key to success. This course equips you with the skills and mindset needed to thrive in the face of adversity, fostering a resilient and thriving work environment. Explore how you can become more resilient and effectively handle your daily challenges without burnout and with greater confidence - while staying fully engaged, energized, and motivated. Topics include:

- Develop emotional resilience and the ability to bounce back from setbacks.
- Build a culture of resilience within your team or organization.
- Recognize the importance of embracing change and learning from failures.
- Foster a positive attitude in the face of uncertainty.
- Implement strategies to maintain productivity and motivation during challenging times.

## **What to Do When it Didn't Go Well - Best Practices**

presented Wednesday by Kelli Vrla, CSP & CCSP

96% of unhappy members won't tell you when they're mad - they will tell everyone else via Twitter, Yelp, Facebook, etc. If only 4% of unhappy members do bring a matter to your attention, treat it like a precious gift! The opportunity for recovery is a valuable way to keep members happy. Their endorsement can be your best form of advertising! Highlights include:

- Resolve complaints faster, transforming conflict into cooperation.
- Understand why members may become difficult and demanding.
- Learn the 5-Step Recovery Process to become a problem solver!
- Recognize situational service strategies to handle members' needs more efficiently.

## Meet the Experts



**Don Arkell** is a senior consultant of CU Lending Advice LLC. As such, he consults and conducts training sessions on various lending topics for professionals that work in the credit union industry. Don began his credit union career at Clark County Credit Union, working with Brett Christensen as one of his original hires and a member of his first sales team. While at CCCU, Don quickly moved through the ranks at the credit union, working in all areas of Sales and Lending.

Don's unique leadership style and passion for Sales and Leadership have made him a highly sought-after speaker, trainer, and strategist. He works with credit unions around the country, helping them grow their loan programs, organizational design, lending technology, and strategic planning.

**Jordan Harrison** is a professional speaker, DEI consultant, Rotarian, and International Youth Development Specialist. Born in Chicago, IL, he earned his BS from San Diego State and his Masters in Education from Harvard University. Most importantly, he is a disruptor to make a difference. He lives a mission-driven life, where he is focused on eradicating inequality with the constant reminder of our collective shared humanity. His work has allowed him to speak to over 250,000 people in boardrooms, classrooms, prisons, and conferences on anti-racism, equity, inclusion, and how to build people and institutions to thrive across differences.

In addition to his work with students and families, he partners with Fortune 500 companies, educational institutions, and non-profits to solve their most pressing equity challenges, seeking to determine how we can create environments where every person can succeed, no matter where they come from. Harrison is committed to the challenging work of transforming hearts, minds, and systems to change our conditions and re-write our conclusions. Harrison continues his work in transforming lives, communities, and the world with the message to encourage others to live out the conviction that our conditions are not our conclusions.



**Eric Herdman** is an accomplished speaker, business leader, and facilitator, who has been professionally in-person speaking for almost 3 decades. Eric's sessions will entertain, inform, educate, and engage the audience into action. He delivers more than just a seminar; you get an educational training experience!

Eric attended Ohio State University. For over 38 years, Eric has walked the walk as a competitive ultra-endurance athlete, competing in 103 triathlons, 6 marathons, and 35 ultra marathons. Eric holds the 12-hour course record at both "Flatlanders" race and "Race Against the Clock," as well as the 50-mile course record in the "Valley of Fire" race. He has also participated in many 24-hour races, including the "Ultimate Treadmill Challenge," running for 24 hours on a treadmill.

Eric started speaking professionally in 1996, and draws on his experiences as a small business owner and competitive athlete to help others learn and grow. He works with a variety of clients, from multi billion-dollar pharmaceutical companies to top financial institutions to national associations and government agencies. Eric's clientele includes one of the world's largest franchise health club chains, who utilized his strategies to reach a \$20,000 increase in revenue in just the first month after his training.

Eric has published several e-books, including "Time, Energy, and Focus," which features a technique he created to improve productivity, and "The Power of Communication."



## Meet the Experts



**Christy Jones** is a shareholder with the law firm of Sherpy & Jones, P.A. She graduated with honors from the College of Charleston and received her J.D. from USC School of Law. Christy was an Associate Articles Editor for the South Carolina Law Review and a member of the Order of the Wig & Robe. Christy has served as an adjunct professor at USC School of Law, teaching legal writing to first-year students. She currently concentrates her practice in the areas of creditor/debtor rights, bankruptcy, collections, and foreclosure.

Christy is a member of the South Carolina Bar Association and South Carolina Bankruptcy Law Association, and is admitted to practice before the South Carolina Federal Court, District of South Carolina. She is a regular speaker at multiple credit union leagues and conducts training for CUNA's National Collections and Bankruptcy Conference.

**Dr. Tracey C. Jones, MBA, PhD** is nationally known for her leadership expertise, as well as her ability to connect on a core level with her audiences. Tracey is the President of Tremendous Leadership and T3 Solutions. With her signature wit, Tracey masterfully weaves leadership concepts and actionable strategies together with humor and a deep understanding of life in the workplace.

At the core of her philosophy on leadership is the simple belief that a commitment to lifelong learning results in a resilience and positive attitude that can alter the work environment for the better each and every day. With nearly four decades of experience across four industries, from the military to semi-conductor to publishing, Tracey has crafted organizational leadership techniques that can be implemented right away for noticeable results. She challenges her audiences to bravely embrace their challenges and take the all-important next steps toward effecting meaningful change in their personal and professional lives.



**Rosemary Laack** is a three-time award-winning leader and speaker who uses her energetic trademark approach to coach, speak, and train all over the world. Her passion and talent for understanding the unique challenges business professionals face today is the crux of her tremendous appeal and success. This ability has formed the core value of her sessions on assertive communication, leadership, and conflict management.

Rosemary earned two bachelor's degrees - one in business and one in music - from Indiana University-Bloomington. She got her business initiation over 20 years ago when she became a purchasing manager with Procter & Gamble. In 2007, Rosemary founded her own coaching and professional speaking firm. By the end of the year, she had earned the America's Brightest Speaking Star award for her speaking excellence. Rosemary Laack - she's a proven coach, speaker, and trainer whom you can count on to deliver a fresh approach to managing work, relationships, and careers!



**Michael Leone**, the Credit Union Enthusiast, has been sparking change in the industry for over a dozen years. Currently, he's the Employee Experience Director at Widget Financial, where he's not just a manager, but a mentor, a coach, and a trainer. With a career spanning 24 years, Mike crafts interactive training experiences that are more Broadway than boardroom. His secret sauce? A theatrical background that helps employees break free from their preconceptions, take daring leaps, and, most importantly, enjoy the ride.

Mike's not just about business; he's about people. He's worked shoulder-to-shoulder with the renowned Dr. James Smith Jr., spreading the gospel of effective presentation skills across companies nationwide. Mike is also the creator of [www.TapBackIn.com](http://www.TapBackIn.com), a digital oasis where he shares his musings on business, life, and the spaces in between. It's not just a blog; it's a journey to help people rediscover their best selves.



**Sarah Shirck** is the Senior Vice President of Organizational Growth and Development at Yes&. Shirck is an expert in organizational management, project management, Agile product delivery, and transformations. Uniquely, she has relevant experience in both agency and client-side advertising and public relations. Sarah acts as a trusted coach and advisor, facilitating vision, human-centered design, strategic planning, and other custom-designed/tailored workshops. She supports executives and senior leaders on their leadership journeys and guides organizations through transformations, mergers and acquisitions, and maturing internal capabilities. Sarah has directed full life cycle software development using traditional waterfall and Agile frameworks, such as Scrum and Kanban.

Sarah currently provides coaching and advising to a diverse group of chief executives and senior leaders at various stages in their leadership journeys in the commercial, public, and non-profit sectors. Prior to joining Yes&, Shirck was Business Partner at SEI. Earlier, she was with Excella Consulting, Southern Cross Aviation, and McCann Erickson.



**Randy C. Thompson, Ph.D.**, is the CEO and founder of TCT Risk Solutions LLC, a CUSO. He has consulted with credit unions for over 36 years. He is the creator of a series of risk management tools used by credit unions, many of which are delivered online and address loan and deposit pricing, interest rate risk and liquidity, credit migration, delinquency management, and Current Expected Credit Loss (CECL). Randy travels throughout the country providing consulting and training individualized to the specific needs of each credit union and its staff.

Randy was awarded the Kim Bannon Eternal Flame Award for service to credit unions by the California/Nevada League in 2013. Prior to his consulting career, Randy was Vice-President, Senior Commercial Lending Officer for First Security Bank. He is the father of 12 children and grandfather to 34 grandchildren.



**Kelli Vrla, CSP, CCSP**, a Road Warrior for Workplace Engagement, is on a quest to help busy professionals boost engagement and cut distractions, while keeping an eye on customer satisfaction and the bottom line.

Kelli has enlightened and "enter-trained" thousands in the U.S., Europe, Asia, and both North and Central America with one her powerful Leadership and Engagement topics. She shares her lessons and 30+ years' experience dealing with difficult people, unexpected challenges, and constant change.

As a kick-off morning show host, Kelli energized listeners on the NATION'S first all-women TALK RADIO SHOW. In addition to serving on the boards of the National Speakers Association-North Texas and both the Dallas & Boulder Classical Guitar Societies, she has worked with clients ranging from Lockheed Martin, NASA, H&R Block, ExxonMobil, Wal-Mart, The Department of Defense, IBM, and Southwest Airlines.



Course topics, descriptions, and facilitators are current as of February 1, 2024.  
Visit [www.ExpandExpo.org](http://www.ExpandExpo.org) for complete course descriptions.



# Hershey Lodge

Stay with the excitement! Expand Expo 2024 will be held in the Sweetest Place on Earth - Hershey, PA. Nicknamed Chocolate Town USA, Hershey is home to the most famous candy maker in America.

The Hershey Lodge boasts first-class amenities, including:

- 6 On-Site Restaurants
- Meltspa by Hershey
- Hershey's Water Works
- Fitness Center
- Gift Shop
- Complimentary Electric Vehicle Charging
- And More!

In addition to all the amenities offered at the Hershey Lodge, the resort is just a short drive from other area attractions, including:

- Hershey Park
- Hershey Museum
- Chocolate Town USA
- Chocolate World
- Tanger Outlets
- Hershey Country Club
- Zoo America



#### Distance From Nearest Airports:

- Harrisburg International - 10 miles
- Baltimore - 101 miles
- Philadelphia International - 104 miles

Expand Expo attendees can reserve a room at the Hershey Lodge for just \$169 per night, plus tax. Attendees enjoy a complimentary breakfast buffet with their stay.

Contact the Hershey Lodge at 855-729-3108 and mention Horizon Federal Credit Union or book online using the QR Code below to reserve your room at the special rate.



# Daily Workshop Schedule

Below is the schedule of workshops offered at Expand Expo 2024.

## Monday

- The Art of Persuasion - Influencing without Authority
- Creating Jaw-Dropping Member Experiences
- Decisioning in Risk-Based Lending
- Foundations of Leadership: Understanding Personal Leadership Styles
- Leadership Ethics for Credit Union Professionals
- Resilient Leadership Essentials
- Strategic Lending for Lending Managers
- Unleash Your Inner Presenter: Tapping Back Into the Art of Dynamic and Engaging Presentations

## Wednesday

- Bankruptcy
- Creating a Competitive Advantage - How to Anticipate, Strategize, and WIN!
- Effective Loan Management
- From Chaos to Calm - Stress Management Strategies for Success
- How Leaders Inspire, Influence, and Achieve Results
- Influence of Leadership: Multiplying the Impact of Teams
- What to Do When it Didn't Go Well

## Tuesday

- Collections
- Constructive Conversations - A Guide to Giving and Receiving Feedback
- Consumer Lending for Frontline Staff
- Critical Thinking
- Effective Risk-Based Pricing
- Foundations of Leadership: Understanding Personal Leadership Styles
- Mastering Resilience - Building Adversity Intelligence at Work

## Thursday

### **A Culture of Service: Building Success From Within**

presented by

**The Ritz-Carlton Leadership Center**

For the most complete and updated schedule, course descriptions, and trainer bios, please visit our website [www.ExpandExpo.org](http://www.ExpandExpo.org).

Training resources specific to each workshop will be made available to attendees the morning of the workshop.

Workshops will begin at 9:00am and end at 4:00pm on Monday, Tuesday, and Wednesday. A one-hour lunch break will be provided at 12:00pm, and a 30-minute networking break at 2:30pm. A morning break will be at the individual instructor's discretion. Thursday's workshop will follow the same morning schedule; classes will end at 3:30pm, with no afternoon break.



# Daily Agenda

## Sunday, September 8, 2024

4:00pm - 5:30pm Registration  
4:00pm - 6:30pm Welcome Reception

### Breakfast

Hot breakfast buffet is provided for guests of the Hershey Lodge from 8:00am - 9:00am each day.

## Monday, September 9, 2024

7:30am - 9:00am Registration  
8:00am - 9:00am Breakfast/Vendor Show  
9:00am - 4:00pm Training Workshops  
12:00pm - 1:00pm Lunch/Vendor Show  
2:30pm - 3:00pm Networking Break  
4:00pm - 6:00pm Vendor Show  
4:00pm - 6:00pm Evening Reception

### Networking Breaks

Collaborate with and learn from colleagues and vendors Monday - Wednesday.

Drinks and themed-snacks will be served.

### Evening Receptions

Limited open bar and heavy hors d'oeuvres offered Sunday. Monday evening is a cash bar with heavy hors d'oeuvres.

## Tuesday, September 10, 2024

8:00am - 9:00am Breakfast/Vendor Show  
9:00am - 4:00pm Training Workshops  
12:00pm - 1:00pm Lunch/Vendor Show  
2:30pm - 3:00pm Networking Break

### Dinner and Entertainment

Join us Wednesday evening for dinner and live entertainment with The Killer Pianos.

### Vendor Show

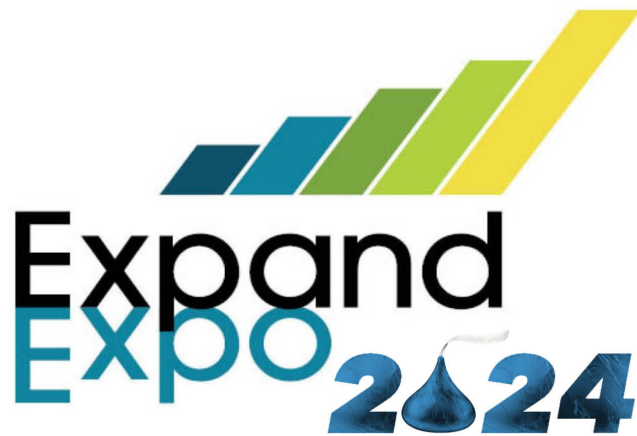
|                        |                  |
|------------------------|------------------|
| Monday, September 9:   | 8:00am - 9:00am  |
|                        | 12:00pm - 1:00pm |
|                        | 2:30pm - 3:00pm  |
|                        | 4:00pm - 6:00pm  |
| Tuesday, September 10: | 8:00am - 9:00am  |
|                        | 12:00pm - 1:00pm |

## Wednesday, September 11, 2024

8:00am - 9:00am Breakfast  
9:00am - 4:00pm Training Workshops  
12:00pm - 1:00pm Lunch  
2:30pm - 3:00pm Networking Break  
5:00pm - 8:30pm Dinner & Live Entertainment

## Thursday, September 12, 2024

8:00am - 9:00am Breakfast  
9:00am - 3:30pm The Ritz-Carlton Training Workshop  
12:00pm - 1:00pm Lunch



September 8 - 12, 2024

Hershey Lodge  
Hershey, PA

By attending Expand Expo 2024, you can take advantage of everything we have to offer:

- Choice to attend a different full-day workshop each day.
- Hot buffet lunch each day Monday - Thursday.
- Networking snack break each day Monday - Wednesday.
- Thursday featured workshop with The Ritz-Carlton Leadership Center.
- Evening receptions Sunday & Monday evenings.
- Dinner and live entertainment Wednesday evening.
- Access to credit union partners at our vendor show Monday and Tuesday.
- Low-price rooms at the Hershey Lodge, which includes a daily hot breakfast buffet.

**Register today by completing and mailing the registration form on the following page or visiting us online at [www.ExpandExpo.org](http://www.ExpandExpo.org)**

For additional questions, please contact:

Mike Patterson (570) 326-3636 x 116  
[mpatterson@horizonfcu.org](mailto:mpatterson@horizonfcu.org)

Justin Howard (570) 326-3636 x 214  
[jhoward@horizonfcu.org](mailto:jhoward@horizonfcu.org)

**\$999 per person**

**Early-Bird Special**

**\$799 per person if registered  
by June 2, 2024**

# Expand Expo 2024 Registration

Attendee \_\_\_\_\_

Credit Union \_\_\_\_\_

Job Title \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Attendee \_\_\_\_\_

Credit Union \_\_\_\_\_

Job Title \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Attendee \_\_\_\_\_

Credit Union \_\_\_\_\_

Job Title \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Mail payment and registration forms to:

**Horizon Federal Credit Union**

ATTN: Expand Expo  
2849 Reach Road  
Williamsport, PA 17701



September 8 - 12, 2024

Hershey Lodge  
Hershey, PA

Full payment and registration form due August 1, 2024.

Please make checks payable to **Horizon Federal Credit Union**, subject line "Expand Expo."

\$799 if postmarked prior to **June 2, 2024**.

\$999 if postmarked after **June 2, 2024**.

Requests for refunds must be postmarked no later than August 8, 2024, and will be issued at 50% of the registration cost. Refund requests received after that day will not be accommodated.

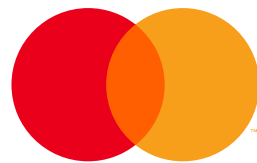
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mpatterson@horizonfcu.org

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justin.howard@horizonfcu.org

Additional information and online registration is available on our website **www.ExpandExpo.org**. Expand Expo reserves the right to refuse or decline registration at our own discretion.

Sponsored By:



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