



# STRATEGIC HUMAN RESOURCE MANAGERS' FORUM

18 - 20 JUNE 2008

Sofitel Gold Coast  
81 Surf Parade, Broadbeach,  
Queensland

A forum for managers from credit unions & mutual building societies with a specific interest in exploring the potential contribution to business strategy of contemporary strategic human resource management concepts and techniques.

This inaugural *Strategic Human Resource Managers' Forum* has been developed as a highly interactive sharing of ideas and experiences between Human Resources Managers in mutual ADIs. The forum is seeking to invigorate the role of strategic human resource management across all mutual ADIs through a structured networking experience and to identify areas in which AMInstitute and its partners may be able to provide professional support to these managers.

Australasian Mutuals Institute  
abn 50 023 683 196

AMInstitute CPD accreditation: 12 hrs

# PROGRAM

## Wednesday 18<sup>th</sup> June

2.00 - 3.00pm	<b>Positioning the Strategic HR Forum</b> <ul style="list-style-type: none"><li>- Forum Positioning &amp; Objectives</li><li>- Strategic Challenges for Mutual ADIs</li><li>- Strategic HR - Areas of Focus</li><li>- Building Organisational Capability</li></ul>	<b>Ken Pickering</b> <i>Executive Manager,</i> <i>Professional Development</i> AMInstitute Ltd
3.00 - 3.30pm	<i>Networking &amp; Afternoon Tea</i>	
3.30 - 5.00pm	<b>Building Organisational Capability through Employer Brand &amp; Cultural Development Strategies</b> <ul style="list-style-type: none"><li>- The Community First Approach</li><li>- Open Forum Discussion</li></ul>	<b>Janine Phillips</b> <i>Head of Talent Management</i> <i>Community First Credit Union</i>
6.00 - 7.00pm	<i>Networking &amp; Welcoming Drinks</i>	
7.00pm	<i>Free Evening</i>	

## Thursday 19<sup>th</sup> June

9.00 - 10.30pm	<b>Building Organisational Capability through Skills Identification, Attraction, Engagement &amp; Retention Strategies</b> <ul style="list-style-type: none"><li>- The Savings &amp; Loans Approach</li><li>- Open Forum Discussion</li></ul>	<b>Bob Lucas</b> <i>Executive Manager</i> <i>Human Resources</i> Savings & Loans Credit Union (SA) Ltd.
10.30 - 11.00am	<i>Networking &amp; Morning Tea</i>	
11.00 - 12.30pm	<b>Building Organisational Capability through High Performance Leadership Strategies</b> <ul style="list-style-type: none"><li>- The Credit Union Australia Approach</li><li>- Open Forum Discussion</li></ul>	<b>Tom Donaghy</b> <i>Head of People &amp; Culture</i> Credit Union Australia Ltd
12.30 - 1.30pm	<i>Lunch &amp; Networking</i>	
1.30 - 3.00pm	<b>Building Organisational Capability through Training, Education &amp; Professional Development</b> <ul style="list-style-type: none"><li>- AMInstitute &amp; Partners Strategic Positioning</li><li>- FutureStaff - New Strategic Positioning</li><li>- Open Forum Discussion - Mutual ADI experiences</li></ul>	<b>Ken Pickering &amp; Dr Mark Sinclair</b> <i>Managing Director</i> PS-146 Training Australia & FutureStaff Ltd
3.00 - 3.30pm	<i>Networking &amp; Afternoon Tea</i>	

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|----------------|---|---|
| 3.30 - 5.00pm  | <b>Building Organisational Capability through Change Management Strategies</b> <ul style="list-style-type: none"> <li>- A Case Study involving the merger of two credit unions facing the inevitable challenges of how to engage their people in the new organization; education about what change involves; getting people on board and gaining their commitment</li> <li>- Open Forum Discussion - Mutual ADI experiences.</li> </ul> | <b>Lindsay Adams</b><br><i>Chairman Remacue &amp; John Weier</i><br><i>Acting Chief Executive Officer</i><br>Queenslanders Credit Union |
| 6.30 - 10.30pm | <i>Pre Dinner Drinks then Forum Dinner</i>  |   |

## Friday 20<sup>th</sup> June

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|-----------------|---|--|
| 9.00 - 10.30am  | <b>Building Organisational Capability through Intelligent Industrial Relations</b> <ul style="list-style-type: none"> <li>- Overview of Credit Unions' experience with managing industrial relations issues and agreements</li> <li>- What Challenges and Opportunities does the new Industrial Relations Environment bring</li> <li>- Open Forum Discussion</li> </ul> | <b>Nick Chadwick</b><br><i>Principal, Chadwick Workplace Law</i>       |
| 10.30 - 11.00am | <i>Networking &amp; Morning Tea</i>   |  |
| 11.00 - 12.30pm | <b>How should HR be Influencing Business Strategy in Mutual ADIs and in which areas do they need Support?</b> <ul style="list-style-type: none"> <li>- Panel Session involving interaction between the Session Leaders and Forum Participants</li> </ul>  | <b>Ken Pickering &amp; Lindsay Adams</b><br>Panel Session Facilitators |
| 12.30 - 2.00pm  | <i>Close &amp; Forum Lunch</i>  |  |

# ➤ Your Expert Presenters

## **Ken Pickering**

Ken is currently the Executive Manager, Professional Development for AMInstitute and was the former Chief Executive Officer of the Australasian Institute of Credit Union Directors from July 1994 to December 2005 prior to the merger between AICUD and AICUM to create AMInstitute on 1<sup>st</sup> January 2006. Ken is also Deputy Chairman of Community First Credit Union, a member of the Corporate Governance Committee and Chairman of the Board Audit and Risk Committee

Ken has served as a director on the Community First Board for over 35 years including eight years as Chairman and over seventeen years as Vice/Deputy Chair.

In an earlier stage of his career, Ken worked for 25 years for Sydney Water across construction, operations and maintenance, urban development and various administrative disciplines including his final ten years between 1983 - 1993 in senior executive positions driving major reform programs using modern strategic human resource management strategies.

## **Janine Phillips**

Janine Phillips is an experienced human resources and organisational development professional with extensive experience in the credit union sector having held executive management positions at New England Credit Union and Community First Credit Union.

Janine has a strong working knowledge of human resources practices through the development of extensive policy framework, particularly in the areas of recruitment and selection, performance management and induction programs.

Janine is a graduate of the Australian Institute of Company Directors (GAICD), a member of the Australian Human Resources Institute (MAHRI) and is currently completing formal studies in human resources management at the University of New England.

Janine's interest and passion lies in change management and workforce planning and management.

## **Bob Lucas**

Bob has had over 35 years experience in HR and HR related fields in the public and private sector in the UK and Australia. His experience has spanned across Defence, Health Insurance, the Food Processing Industry, Mining and of course the Finance sector.

Bob's work in the Finance industry began in the early eighties when he took up the position of Training Development Manager in the South Australian Mutual, the Co-op Building Society. During his 14 years with the Co-op, Bob and his team provided training and development services that helped to shift the culture of the organisation from a predominantly service to a sales culture. Bob was also heavily involved in the development of training plans for the merger with two SA based Building Societies and the conversion of the Co-op to a Bank - Adelaide Bank. While he was with the Bank, Bob was assigned to Leader Federal Bank in the United States for three months to study their HR operations and to begin the process of an exchange program.

In 1996, Bob moved to Savings & Loans Credit Union as the Senior Manager, Human Resources. Bob now serves on the Executive Committee as the Executive Manager, Human Resources. With a team of 15 HR and OD specialists, Bob has the overall responsibility for the strategic direction of HR within S&L and the operational responsibility for HR Services, OD, Payroll, remuneration policies and workplace relations. Over the last 10 years Savings & Loan's reputation as a preferred employer has grown significantly. For the 6<sup>th</sup> year running the CU has achieved formal recognition as an Employer of Choice for Women, received two awards from the Chamber of Commerce for family friendly initiatives and staff satisfaction levels are in the top quartile for the industry.

From a business perspective, Bob has a strong belief that "PEOPLE" are an organisation's *only* sustainable competitive advantage. Unlike other aspects of the business, its products, services, technology etc, PEOPLE are unique, they can't be copied. Therefore they must be highly valued. HR is charged with the responsibility of getting that message across to the Executive team and Line Managers and of ensuring that staff attraction, development and retention is high on the Agenda of business issues under consideration.

### Tom Donaghy

Not originally from the Mutual's sector - Tom started his career with British Aerospace as one of its first management development advisers where he designed and delivered leadership and team based training for productivity improvement. He has also managed innovation and continuous improvement programs for a number of large organisations in both the UK and Australia.

Tom is an experienced organisational development practitioner, with over 22 years in the field. As Head of People and Culture for CUA, Tom is now driving a focussed leadership development framework that helps each CUA leader build better; Attraction, Performance and Retention - through 'Engagement'

Tom's area of speciality is his unique ability to design a tailored process and deliver targeted results that see people "Go for change" both on a personal and organisational level. Tom's approach is fun and stimulates people to perform well beyond their current level. Tom's operating style is all about being direct, yet creating a fun & focussed learning environment where people choose to learn from the wisdom of others and more importantly, themselves!

Tom enjoys trekking, photography, great food, music, movies and theatre and the occasional misdirected golf ball.

### Dr Mark Sinclair

Mark is the CEO of the Mentor Education Group, incorporating FutureStaff and PS146 Training Australia, with offices throughout Australia and New Zealand.

Mark started providing financial services education in 2003, with the strong desire to provide high levels of student satisfaction and skill-based learning outcomes. This 'student focus' is a direct result of Mark's doctoral studies, corporate advisory experience with AT Kearney and KPMG, and three years tutoring to the MBA program at RMIT University.

During his career, Mark has advised senior executives at over 100 organisations in a broad range of industries throughout Australia, South East Asia and the Middle East including strategic assignments for the Commonwealth Bank of Australia, Department of Education, Telstra and the Reserve Bank of Indonesia.

He has a Doctorate of Business Administration, a Masters of Business Administration, Bachelor of Applied Science, Diploma of Financial Services (Financial Planning) and has worked as an internationally recognised ISO 9000 auditor.

### Lindsay Adams

Lindsay is the Chairman of Remacue, a global Community of advisors focused on organisational & leadership development. He is a practiced speaking professional, workshop facilitator, consultant and personal coach. With over 20 years of human resource experience, Lindsay's focus is on delivering programs to meet specific organisational needs and provide educational information in an entertaining way.

Lindsay is a Master Practitioner in Neuro Linguistic Programming and holds many management and training accreditations which he uses in his presentations and work with a diverse range of clients.

He has worked with executive teams, individuals, entrepreneurs and business owners across Australia, New Zealand, Asia and the United States.

Lindsay is a strong supporter of the Institute and has successfully facilitated a range of quality professional development & learning programs for AICUM and AMInstitute since 2001.

## Nick Chadwick

Chadwick Workplace Law commencing business from 16<sup>th</sup> June, 2008 will specialise in all employment related and industrial relations matters.

### ***Chad's background:***

- Chad has a Bachelor of Economics Degree from Sydney University (1988) and a Diploma of Laws from Sydney University (1997);
- He was admitted as a Solicitor of the Supreme Court of NSW in 1999;
- Chad worked for the Employers Federation of NSW for 12 years between 1989 and 2001. During that time he had carriage of the credit union industry and, with Warwick Smith, negotiated the Credit Union Award, 1998 with the Finance Sector Union;
- Between 2001 and early 2008 he worked in private practice in an employment law firm in Sydney;
- Chad continues to advise and represent credit unions in NSW, specifically in relation to workplace agreements, compliance with WorkChoices and day to day workplace issues;
- overall, Chad has 20 years experience in industrial relations and employment law matters.



# REGISTRATION

## ➤ *AMInstitute Continuing Professional Development Accreditation 12 hours*

AMInstitute Members who complete this two-day workshop will earn 12 CPD points

## ➤ *Accommodation*

Please complete the accommodation form below and return direct to the Sofitel Gold Coast, Broadbeach.

## ➤ *Travel*

Delegates are responsible for their own travel arrangements to the Sofitel Gold Coast, Broadbeach.

## ➤ *Further Enquiries*

Sonya Maloney  
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PO Box 525, Burwood NSW 1805  
Ph: (02) 9744 5717 Fax: (02) 9744 5752  
Email: [info@aminstitute.org.au](mailto:info@aminstitute.org.au)

## ➤ *Numbers are Limited*

Please note that numbers are limited for this forum. You are advised to book early.

REGISTRATION CAN ONLY BE CONFIRMED UPON RECEIPT OF APPLICATION FORM AND PAYMENT.

## ➤ *Cancellations and Transfers*

50% refund will be available to persons cancelling with two weeks notice. Cancellations within two weeks of the forum will receive no refund, but will receive forum papers. Alternative persons will be accepted.

## ➤ *Timing*

Wednesday 18<sup>th</sup> June 2008  
2.00pm Registrations, Introductions & first Forum session.

Friday 20<sup>th</sup> June 2008  
12.30-2.00pm Close & Lunch

PLEASE RETURN A COPY OF REGISTRATION WITH PAYMENT TO:

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