



# 2018 CUES Talent Development Guide



# Limitless.

That's your leadership potential.

As a CUES member, you, are the heart of our mission. No matter what offering you choose, CUES' distinct differences, including our proven credit union talent development resources, partnerships with world-renowned business schools, prime networking opportunities and powerful industry insights, give you a strong foundation, helping you to realize your potential and transform you into tomorrow's exceptional leader.

You'll discover our offerings are about much more than just talent development; you'll make connections and build treasured relationships that can help propel your career forward.

**Experience the CUES difference, and realize your greatest potential.**

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# Online Learning Brings CUES to You

CUES' recently introduced online learning opportunities offer flexible talent development options without travel.

## CUES Elite Access™ Virtual Classroom

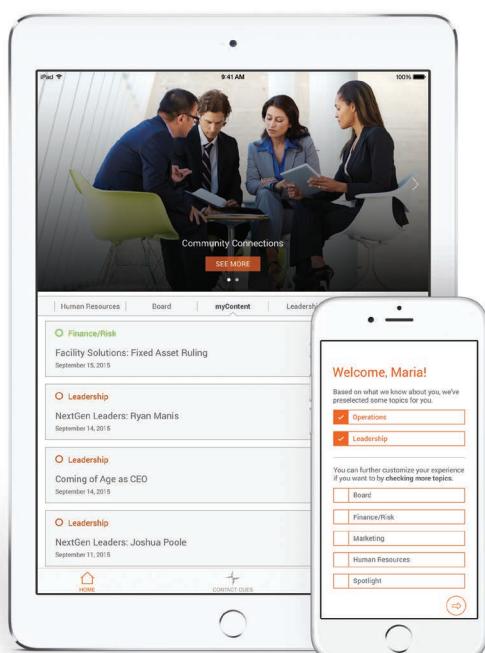
Looking for top-notch talent development? CUES Elite Access Virtual Classroom brings the best features of online and classroom learning together to create a dynamic, innovative approach to professional development. Each course features two, 60 minute live-taught classroom sessions, the opportunity to collaborate with classmates in real time, and direct access to experienced facilitators. Learn more at [cues.org/eliteaccess](http://cues.org/eliteaccess).

## CUES Podcast

CUES Podcast features industry leaders and cross-industry experts discussing their perspectives on the latest credit union topics and trends. Published twice a month, CUES Podcast is available in Google Play, iTunes, and Stitcher. Learn more at [cues.org/podcast](http://cues.org/podcast).

## myCUES App

Download the myCUES app for your iPhone or iPad and get easy access to the CUES content you love, right in the palm of your hand. Conveniently view articles, videos, blog posts, webinars and app exclusives organized by topics, plus share the content with others. Visit [cues.org/mycues](http://cues.org/mycues).



## Install our App!

Use it to easily select the CUES content you'd like, delivered right to your iPad or iPhone. Visit the App Store, and search "myCUES" to download your free app today.

**Get CUES content on your iDevice;  
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## Membership

### You Belong

Memberships are available for executives, directors, future leaders and industry suppliers. Explore the possibilities, and then join forces with more than 14,000 industry leaders who are already part of the CUES network. Visit [cues.org/membership](http://cues.org/membership) for detailed membership information.

## Management Memberships

All memberships for credit union professionals offer access to valuable networking, discounts on our professional development opportunities, free webinars and free publications.

### CUES Advancing Management Group Membership

Share the best CUES has to offer with your entire team of executives and future leaders. Your organization will benefit from a consistent, shared learning approach to talent development now and into the future.

### CUES Executive Group Membership

Provides a full array of benefits to a CEO and his/her direct-report executives. This membership ensures your top executive team is staying abreast of industry issues and trends they can share throughout the organization.

### Individual Membership

This option is available to any current credit union executive or future leader and is a great way for an individual to take advantage of CUES' invaluable membership benefits.

"Sharonview believes the time is now to invest in our future leaders. We have recently moved to the CUES Advancing Management Group Membership to provide additional resources to our entire leadership team. As each leader has his or her individual development plans to grow their leadership skills and abilities, partnering with CUES will allow them to choose from educational topics that are top-of-the-class in credit union land!"

Bill Partin  
President/CEO  
Sharonview Federal Credit Union  
Fort Mill, S.C.  
Assets: \$1.4 billion



## Board Memberships

Good governance starts at with a CUES Board Membership. Here you will have access to valuable networking, discounts to our professional development opportunities, free webinars and access to CUES Director Education Center.

### **Center for Credit Union Board Excellence (CCUBE) Membership**

The best value for your credit union, all directors, committee members, and CEO are included in this outstanding membership that goes beyond the norm. In addition to the full array of CUES Director Membership benefits, CCUBE provides myriad online resources including predesigned learning plans and a board self assessment.

### **CUES Director Group Membership**

This flat rate option gives the benefits of individual CUES Director Membership to as many board members as you choose.

### **Individual Membership**

CUES Director Membership makes it possible for an individual volunteer to take advantage of the same benefits available in the group memberships.

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## Recognition

Acknowledge the industry's high achievers by submitting nominations for these honors. See details at [cues.org/recognition](https://cues.org/recognition).

- **CUES Outstanding Chief Executive**

Recognizes outstanding leaders at the CEO level

- **CUES Exceptional Leader**

Honors non-chief executive officers

- **CUES Next Top Credit Union Exec (NTCUE) in partnership with DDJ Myers**

Awards up-and-coming leaders with more than \$50,000 in prizes

- **CUES Distinguished Director**

Recognizes volunteers whose efforts have strengthened their credit union

- **CUES Hall of Fame**

Celebrates credit union professionals for life-long dedication to the industry

- **CUES Outstanding Councils**

Presented to regional, member-run groups carrying out CUES' vision of offering exceptional educational opportunities

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## Suppliers

When you need outside expertise, connect with the best: CUES Supplier members. Look no further for trustworthy, ethical and experienced vendors dedicated to the credit union industry. These member resources make it easy:

- *CUES Annual Buyer's Guide* includes our full list of trusted vendors.

Visit [cues.org/buyersguide](https://cues.org/buyersguide).

- Need a speaker for your next event or meeting? *CUES Supplier Members Speakers Bureau Directory* lists presentations by topic, presentation length, and more. Visit [cues.org/speakersbureau](https://cues.org/speakersbureau).

The information is at your fingertips—the next step is for you to take action.

## CUESolutions

CUESolutions providers are companies CUES has identified as industry experts, and have partnered with to showcase their thought leadership to our membership. For easy access to trusted industry vendors select a firm on the list below to view their products, services, articles, whitepapers, and more. Then, contact them if their offerings can meet your needs.

Credit unions rely on **CUNA Mutual Group** to design benefits plans that attract and retain their executives and employees, and are tailored to help meet their strategic goals. They ensure continuity of leadership with a comprehensive, competitive executive benefits program, and also offer innovative 401(k) and pension plans to help employees enjoy a financially secure future.

Creating and sustaining a healthy organization is not easy. **DDJ Myers** can help you build on current talents, values and vision for optimal organizational fitness through their expertise in: succession planning for boards and executives, strategic planning, executive coaching, board governance, recruitment and renewal.

Learn more about our CUESolutions providers by visiting: [cues.org/products-services/cues-solutions](https://cues.org/products-services/cues-solutions).



## Institutes

### The Measure By Which All Others Will Be Compared

In partnership with the world's top business schools, CUES is proud to offer the finest in executive education. Each institute features esteemed instructors at the top of their field, and holds the promise of delivering career- and life-changing experiences to all attendees.

### Which Institute is Right for You?

Choose your path:

- **Leadership and Strategy**  
CEO Institute™
- **Innovation**  
Strategic Innovation Institute™

- **Growth Strategies and Mergers**  
Strategic Growth Institute™
- **Board Governance**  
CUES Governance Leadership Institute™

## **CEO Institute I: Strategic Planning**

April 8–13

The Wharton School

University of Pennsylvania



Learn to turn challenges into change. Delve into strategic planning through embracing uncertainty, rather than ignoring it. Learn more at [cues.org/inst1](http://cues.org/inst1).

## **CEO Institute II: Organizational Effectiveness**

April 29–May 4

Samuel Curtis Johnson Graduate School of Management

Cornell University



JOHNSON  
Cornell University™

Effective change management skills are needed for even the most thought-out plan. Reach beyond your area of expertise and include every level of executive management in your credit union. Learn more at [cues.org/inst2](http://cues.org/inst2).

## **CEO Institute III: Strategic Leadership Development**

May 20–25

UVA Darden Executive Education



DARDEN  
Executive Education

CEO Institute III represents the highest point in your professional leadership development. You'll uncover the reasons why you lead the way you do, and learn new ways to become a more effective leader. Learn more at [cues.org/inst3](http://cues.org/inst3).



### **Become a Certified Chief Executive (CCE)**

when you have completed all three weeks of CEO Institute and two between segment assignments.



*CEO Institute I: Strategic Planning, Class of 2017*

## CUES Governance Leadership Institute™

April 15–18

Florida International University, Miami

June 10–13

Joseph L. Rotman School of Management

University of Toronto



Rotman School of Management  
UNIVERSITY OF TORONTO

Strengthen your contributions to your credit union as you learn to balance healthy debate and diversity with consensus building at CUES Governance Leadership Institute. Learn more at [cues.org/gli](http://cues.org/gli).



Become a Certified Credit Union Director (CCD).

## Strategic Growth Institute™

July 23–26

The University of Chicago  
Booth School of Business

**CHICAGO BOOTH** The logo for the Chicago Booth School of Business, featuring a shield with a tree and a building.

Executive Education

Walk away knowing how to analyze, evaluate, and recommend specific actions that will grow your credit union while avoiding common pitfalls. You'll also learn to build value by scaling existing markets, entering established markets, or creating new markets through innovation and mergers. Learn more at [cues.org/sgi](http://cues.org/sgi).



*The University of Chicago*



*Stanford University*

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## Strategic Innovation Institute™

July 15–20

Stanford Graduate School of Business

Stanford University

**STANFORD**  
BUSINESS  
Graduate School of  
Executive Education

Learn to embrace innovation and become a successful agent of change. Graduates of this robust, transformational program are well equipped with a comprehensive understanding of innovation that benefits their credit unions immediately. Learn more at [cues.org/sii](http://cues.org/sii).



### Become a Certified Innovation Executive (CIE)

when you complete all required elements of  
Strategic Innovation Institute.



## Schools

### First-Class Learning

CUES' Schools feature top instructors with real-world knowledge, convenient locations, and relevant topics. The curriculums dive deep into the matter at hand, providing tools and ideas you can easily implement once you're home.

Our courses are created with a focus on operational and strategic disciplines to make sure what you're learning is relevant to your role. We have several schools geared toward:

- Senior Executives
- Lending and Finance
- Marketing and Operations
- IT
- Sales and Service
- Risk

An investment in knowledge and skills today will have a positive impact on employee retention, member satisfaction, growth and succession planning. Register today for these sessions at [cues.org/schools](http://cues.org/schools).

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## CUES School of Business Lending™ I: *Business Lending Fundamentals*

April 30–May 4  
Orlando, Fla.

Visit [cues.org/sobl](http://cues.org/sobl) for details.

## CUES School of Business Lending™ II: *Financial Analysis and Diagnostic Assessment*

July 16–20  
Seattle

Visit [cues.org/sobl2](http://cues.org/sobl2) for details.

## CUES School of Business Lending™ III: *Strategic Business Lending*

September 10–14  
Denver

Visit [cues.org/sobl3](http://cues.org/sobl3) for details.

All three of CUES' business lending schools are facilitated by the same experts who train the state and federal examiners. Attend and learn to develop a successful business lending program that is right for your credit union. These may be taken individually or as a series for maximum benefit.

**Register for CUES Schools of Business Lending I, II and III in the same year and save \$1,485.**

## CUES Advanced School of Business Lending™: *Credit Administration*

August 13–17  
Denver

Examiners are increasingly placing Member Business Lending (MBL) practices under intense scrutiny. If your credit union offers MBL, you must have a strong credit administration plan. This intense program will help ensure the procedures you have in place are solid, and assist your department in prepping for and handling an audit should one come your way. Learn more at [cues.org/advsobl](http://cues.org/advsobl).



**Earn the CUES  
Certificate in  
Business Lending**

September 13–14, in Denver

Visit [cues.org/blc](http://cues.org/blc)  
for more!





## CUES School of Applied Strategic Management™

April 30–May 3  
Orlando, Fla.

Help your credit union—and your members—soar. Working as a team, attendees will gain hands-on experience “running” a financial institution in the safety of a virtual environment. Learn more at [cues.org/sasm](http://cues.org/sasm).

## CUES School of Strategic Marketing™ I

July 16–18  
Seattle

Effective marketing communicates your credit union’s value, improves member experience and drives growth and profitability. Discuss the keys to strategy-focused marketing and data-driven decision making. Learn more at [cues.org/ssm1](http://cues.org/ssm1).

## CUES School of Strategic Marketing™ II

July 19–20  
Seattle

Build on the lessons of CUES School of Strategic Marketing I and discover how to increase returns on marketing investments through effective allocation of resources. Learn more at [cues.org/ssm2](http://cues.org/ssm2).

## Payments University

August 13–14  
Denver

Developed with the experts at CO-OP Financial Services, Payments University will help you respond and keep up with the rapidly changing payments landscape. The program was designed to give executives the tools and hands-on experience needed to identify and respond to “weak signals”—emerging opportunities and challenges that can make or break a credit union’s payments strategy—and design offerings with members in mind.

The unique format combines live-taught online courses with classroom sessions led by world-class instructors. Learn more at [cues.org/payments](http://cues.org/payments).



### Earn the Certified Payments Strategist (CPS)

designation when you complete all course work and assigned projects.

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## CUES School of Consumer Lending™

August 13–14  
Denver

Loan officers—join us to gain a solid base of lending skills that will help you responsibly underwrite profitable loans. You'll gain and retain more of your members' business by meeting their borrowing needs. Learn more at [cues.org/socl](http://cues.org/socl).

## CUES Advanced School of Consumer Lending™

August 15–16  
Denver

Build on what you learned in CUES School of Consumer Lending and discover how to improve your department's overall lending and sales results. Learn more at [cues.org/advsocl](http://cues.org/advsocl).

## CUES School of Enterprise Risk Management™

August 13–16  
Denver

Designed for senior leaders who manage risk, this school focuses on creating value for members and the credit union by elevating the role of risk management. You'll explore ways to optimize ERM in key processes and improve strategic planning, capital management and financial performance. Learn more at [cues.org/serm](http://cues.org/serm).

## CUES School of Member Experience™

September 10–11  
Denver

View your organization from the perspective of your membership and analyze every touch point to ensure you're providing the service level they expect and deserve. Member satisfaction pays off in measurable ways that include retention and growth. Learn more at [cues.org/sme](http://cues.org/sme).

## CUES School of IT Leadership™

September 12–14  
Denver

Prepare your current and future CIOs to successfully guide their department's direction and spending. Examine critical areas such as building a progressive culture to attract top technical and business talent, responding to market forces and developing processes that support rapid execution of change initiatives. Learn more at [cues.org/sitl](http://cues.org/sitl).

\$400 early-bird discount in effect until 45 days prior to each event. Sign up now and save!



**CEO/Executive Team Network™**

## Conferences and Seminars

### Unmistakably CUES

Dynamic speakers and content paired with unique, stimulating environments set CUES' conferences and seminars apart from all others. Attendees will tap into their intellectual curiosity, develop extensive peer networks and bring home new ideas and methods for immediate implementation.

# Conferences

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## CUES Symposium

**January 28–February 1**

**Grand Hyatt Kauai Resort & Spa**

**Koloa, Kauai, Hawaii**

In a unique format, CEOs and board chairs attend together. This meeting of the minds is designed to align the strategic vision of your credit union's top pair of leaders through shared learning experiences. Your team will return home a stronger, more unified force. Learn more at [cues.org/symp](http://cues.org/symp).

## CEO/Executive Team Network™

**Watch [cues.org](http://cues.org) for dates and location.**

This dynamic conference, designed for CEOs and senior managers, focuses on growth opportunities. You'll learn from top speakers who examine strategy and leadership, participate in thought-provoking sessions on the latest industry trends and enjoy unparalleled networking . Learn more at [cues.org/cnet](http://cues.org/cnet).

## Directors Conference

**December 2–5**

**Hilton Waikoloa Village**

**Waikoloa, Big Island, Hawaii**

This comprehensive event for credit union directors takes an in-depth look at the relevant governance and strategic issues affecting your board, credit union and the movement. Learn more at [cues.org/dc](http://cues.org/dc).

## Board Liaison Workshop

**December 2–3**

**Waikoloa, Big Island, Hawaii**

Board liaisons are truly in the thick of things, serving as a communication hub and making sure others have what they need to succeed. Our new Board Liaison Workshop, a companion to Directors Conference, is designed to make you more effective in this role! Learn more at [cues.org/blw](http://cues.org/blw).

"At Redstone Federal Credit Union, we have participated in and benefited immensely from the CUES conferences. Annually, I attend CUES Symposium: A CEO/Chairman Exchange with our board chair. We both find the instruction, camaraderie, dialog and collaboration with other chairs and CEOs very rewarding. This conference enables us to move into our annual strategic planning sessions confidently, knowing that we have met with great minds who know the latest in trends, governance and board/executive planning. CUES is cutting-edge and these conferences, as well as other teaching tools utilized by other staff, committee and board members, help keep RFCU safe and sound."

Joseph H. Newberry  
President/CEO  
Redstone Federal Credit Union  
Huntsville, Ala.  
Assets: \$4.8 billion

## Seminars

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### Execu/Summit®

March 11–16

The Summit at Big Sky

Big Sky, Mont.

This meeting's unique schedule—bookending educational sessions around midday networking on the slopes—will leave you armed with the knowledge you need to take your organization's performance to the next level. Learn more at [cues.org/es](http://cues.org/es).



### Execu/Blend™

April 29–May 2

Hyatt Vineyard Creek

Santa Rosa, Calif.

Explore strategic development and differentiation, discover how to set a robust strategy, and learn the power of storytelling in innovative leadership from Wharton and Stanford Graduate School of Business experts. We'll also take a trip to a local winery to hear their story and learn how they differentiate themselves in a highly competitive market. Then explore Sonoma and network with your peers. Learn more at [cues.org/eb](http://cues.org/eb).

### Supervisory Committee Development Seminar

July 23–24

Kimpton Hotel Palomar San Diego

San Diego

As a supervisory committee member, you need to be able to work with management, the board and internal and external auditors. You also need to be knowledgeable about the different risks facing credit unions and be prepared to handle any challenges that arise. Learn more at [cues.org/scds](http://cues.org/scds).

### Business Lending for Directors Seminar

July 23–24

Kimpton Hotel Palomar San Diego

San Diego

Business lending can be highly profitably, but it must be done the right way to be successful—including having a board that fully understands their role and responsibilities. Leave this advanced session knowing your board's role in creating a viable and sustainable member business services program.

Learn more at [cues.org/blds](http://cues.org/blds).





## CUES Director Strategy Seminar

July 25–27

**Kimpton Hotel Palomar San Diego  
San Diego**

High performing organizations cultivate strategy year-round to develop market-driven plans with solid underlying value propositions. Discover how to develop measurable strategic objectives as you learn about the need for quality strategic thinking, strategic planning vs. tactical planning, challenges of succession planning, and more. Learn more at [cues.org/dss](http://cues.org/dss).

## Execu/Net™

August 19–22

**Hilton Sedona Resort at Bell Rock  
Sedona, Ariz.**

Broaden your perspective, challenge yourself and try new things as our speakers guide you through powerful morning sessions, covering growth strategies, financial complexity and innovation. Each afternoon, interact with peers and nature for a fresh perspective. Learn more at [cues.org/en](http://cues.org/en).

## Board Chair Development Seminar

September 10–11

**Omni Amelia Island Plantation Resort  
Amelia Island, Fla.**

The chairperson's primary role is to maximize the value of the board while maintaining a delicate balance with effective governance. Attend to gain the unique, advanced skill set you need to lead a high-performing board. Learn more at [cues.org/bcds](http://cues.org/bcds).

## CUES Director Development Seminar

September 12–14

**Omni Amelia Island Plantation Resort  
Amelia Island, Fla.**

Board members must efficiently fulfill their fiduciary responsibilities. Attend and advance your governance skills and maximize the traits you need to successfully reach your credit union's goals. Learn more at [cues.org/dds](http://cues.org/dds).



## Strategic Solutions and Partnerships

### Beyond the Basics

When developing our products and services we start with one simple question: What do credit union leaders need to succeed? Then, we partner with experts in the industry to provide resources to help you grow. We focus on the key areas of talent development, human resources, governance, strategic planning and risk management.

## Surveys

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### **CUES Executive Compensation Survey**

Keep tabs on compensation trends while engaging with valuable tools and data to help you attract and retain qualified professionals. Benchmark your organization against others based on asset size, region, membership size and more. Purchase now at [cues.org/ecs](http://cues.org/ecs).

### **CUES Employee Salary Survey**

Use CUES' data and tools to benchmark salaries for non-executive positions. Choose your peer group based on asset size, region, membership size, and more. Purchase now at [cues.org/ess](http://cues.org/ess).

## Board

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### **CUES eVote™**

CUES eVote voting software streamlines merger and bylaw votes, board elections, and membership surveys; managing everything from ballots, to member service, to tabulating the final results. Learn more at [cues.org/evote](http://cues.org/evote).

### **Quantum Governance, L3C**

Unravel your board's complicated roles and responsibilities, and combine leading-edge governance with strategic thinking to become an even greater asset to your credit union. Learn more at [cues.org/qg](http://cues.org/qg).

### **Board Governance Assessment**

Take an honest look at your board with this anonymous, online assessment tool. Evaluate board performance in key areas of governance and create a plan to improve. Purchase now at [cues.org/boardassess](http://cues.org/boardassess).

### **Director Skills Assessment**

Improve board recruitment and focus training resources by evaluating director's individual and collective capabilities to pinpoint skill set gaps in five key areas. Purchase now at [cues.org/directorassess](http://cues.org/directorassess).

### **CEO Assessment for Credit Unions**

Strengthen CEO performance with this unique, web-based CEO evaluation tool combining data provided by both the CEO and directors. Purchase now at [cues.org/ceoassessment](http://cues.org/ceoassessment).

## Strategy and Risk

### Cornerstone Advisors, Inc.

Through vendor management, benchmarking, technology and risk assessment, and mergers and acquisitions, Cornerstone helps credit unions reduce costs, increase revenue and stay competitive. Fill out an interest form today at [cues.org/cornerstone](http://cues.org/cornerstone).

### ServiStar®

ServiStar will provide you with the tools to succeed in developing a member-centric team of employees that exceed member expectations and grow profitable relationships. Learn more at [cues.org/servistar](http://cues.org/servistar).

#### ServiStar Member Experience Builder

Develops a member-centered organizational culture and provides resources to ensure lasting needs-based selling behavior and performance. Its comprehensive, customizable model maximizes employee engagement, member experience, and profitability.

#### ServiStar Selling Solutions

Designed to begin the shift from order taking to needs-based, member-centric selling. Start to build a front line staff who effectively offer products and services to enhance a member's financial life.



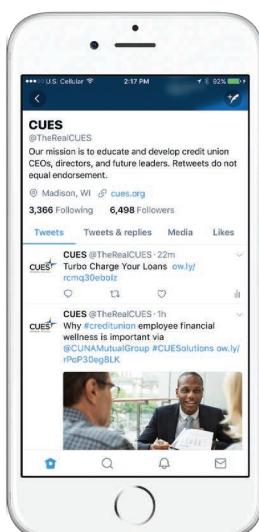
## Credit Union Management Magazine

CUES' award winning monthly magazine provides in-depth information for credit union leaders. Our well-researched and detailed articles explore the industry's most important topics. Published 12 times a year--in print and digital formats--each issue includes subjects relating to credit union general management, operations, marketing, human resources and the board of directors. Visit [cues.org/cumanagement](http://cues.org/cumanagement) to learn more today.



## Keep Up With The Latest

Connect with CUES on social media!



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[feeds.feedburner.com/cues/feed](http://feeds.feedburner.com/cues/feed)



CUES is a Madison, Wisconsin-based, independent, not-for-profit, international membership association for credit union executives. Our mission is to educate and develop credit union CEOs, executives, directors and future leaders.

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