

2018

CUES Talent Development Guide for Canadian Credit Unions



Unequalled. Unforgettable. Unmistakably CUES.

CUES' Institutes			Page
CEO Institute I: <i>Strategic Planning</i>	April 8–13	The Wharton School, University of Pennsylvania	4
CEO Institute II: <i>Organizational Effectiveness</i>	April 29–May 4	Samuel Curtis Johnson Graduate School of Management, Cornell University	4
CUES Governance Leadership Institute™	April 15–18	Florida International University, Miami	5
CEO Institute III: <i>Strategic Leadership Development</i>	May 20–25	UVA Darden Executive Education	4
CUES Governance Leadership Institute™	June 10–13	Joseph L. Rotman School of Management, University of Toronto	5
Strategic Growth Institute™	June 23–26	The University of Chicago, Booth School of Business	5
Strategic Innovation Institute™	July 15–20	Stanford Graduate School of Business, Stanford University	5
CUES' Schools			
CUES School of Applied Strategic Management™	April 30–May 3	Orlando, Fla.	7
CUES School of Strategic Marketing™ I	July 16–18	Seattle	7
CUES School of Strategic Marketing™ II	July 19–20	Seattle	7
Payments University	Aug. 13–14	Denver	7
CUES School of Enterprise Risk Management™	Aug. 13–16	Denver	7
CUES School of Member Experience™	Sept. 10–11	Denver	7
CUES School of IT Leadership™	Sept. 12–14	Denver	7
CUES' Director Education			
Execu/Summit®	March 11–16	Big Sky, Mont.	9
CUES Governance Leadership Institute™	April 15–18	Florida International University	9
Execu/Blend™	April 29–May 2	Santa Rosa, Calif.	9
CUES Governance Leadership Institute™	June 10–13	Joseph L. Rotman School of Management, University of Toronto	9
Strategic Growth Institute™	June 23–26	The University of Chicago Booth School of Business	5
CUES Director Strategy Seminar	July 25–27	San Diego	9
Execu/Net™	Aug. 19–22	Sedona, Ariz.	9
Board Chair Development Seminar	Sept. 10–11	Amelia Island, Fla.	9
CUES Director Development Seminar	Sept. 12–14	Amelia Island, Fla.	9
Board Liaison Workshop	Dec. 2–3	Waikoloa, Big Island, Hawaii	9
Directors Conference	Dec. 2–5	Waikoloa, Big Island, Hawaii	9
CUES' Conferences			
CUES Symposium	Jan. 28–Feb. 1	Koloa, Kauai, Hawaii	11
Execu/Summit®	March 11–6	Big Sky, Mont.	11
Execu/Blend™	April 29–May 2	Santa Rosa, Calif.	11
Execu/Net™	Aug. 19–22	Sedona, Ariz.	11
CEO/Executive Team Network™	Watch cues.org for dates and location.		11
Board Liaison Workshop	Dec. 2–3	Waikoloa, Big Island, Hawaii	11
Directors Conference	Dec. 2–5	Waikoloa, Big Island, Hawaii	11
CUES Membership			
CUES Membership		Visit cues.org/canada to review levels and benefits.	13
CUES' Partnerships and Strategic Solutions			
CUES Partnerships and Strategic Solutions		Learn more about CUES' offerings at cues.org/canada	14

CUES' Institutes

The Measure By Which All Others Will Be Compared

In partnership with some of 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™

Prestigious Schools, Esteemed Instructors

Smart executives know ongoing education is the key to success, particularly in the financial services industry. CUES' institutes provide a strong foundation, helping to turn today's professionals into tomorrow's exceptional leaders. CUES has partnered with the world's most prominent business schools to bring unsurpassed educational offerings, all designed specifically for the credit union industry. Learn more at cues.org/canada.



CEO Institute I: *Strategic Planning*

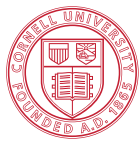
April 8–13

The Wharton School, University of Pennsylvania



Credit union executives and future leaders, take your career to the next level. Learn to turn challenges into change. Delve into strategic planning through embracing uncertainty, rather than ignoring it.

CUES Member \$9,145 / Nonmember \$11,395



JOHNSON
Cornell University™

CEO Institute II: *Organizational Effectiveness*

April 29–May 4

Samuel Curtis Johnson School of Management, Cornell University



Effective change-management skills are needed for even the most thought-out plan. As a credit union executive or future leader, you'll reach beyond your area of expertise and include every level of executive management in your credit union's planning process.

CUES Member \$9,145 / Nonmember \$11,395



DARDEN
Executive Education

CEO Institute III: *Strategic Leadership Development*

May 20–25

UVA Darden Executive Education, University of Virginia



CEO Institute III represents the highest point in your professional leadership development. Designed for credit union executives and future leaders, you'll uncover the reasons why you lead the way you do, and learn new ways to become a more effective leader.

CUES Member \$9,145 / Nonmember \$11,395

Earn your Certified Chief Executive (CCE) designation by successfully completing all three weeks of CEO Institute and two between-segment assignments. This title signifies you've made an ongoing commitment to your professional development, obtaining a level of expertise recognized throughout the credit union industry.

CUES Governance Leadership Institute™

Stateside:

April 15–18

Florida International University, Miami

Canada:

June 10–13

Joseph L. Rotman School of Management, University of Toronto



Directors and executives, strengthen your contributions to your credit union as you learn to balance healthy debate and diversity with consensus building at CUES Governance Leadership Institute.

CUES Member \$5,995 / Nonmember \$7,495

Directors who complete CUES Governance Leadership Institute will become a Certified Credit Union Director (CCD). This prestigious certification honors your outstanding professional development efforts and represents your dedication to the credit union movement



Rotman School of Management
UNIVERSITY OF TORONTO

Strategic Innovation Institute™

July 15–20

Stanford Graduate School of Business, Stanford University



Credit union executives, future leaders and graduates of CUES' CEO Institute will 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.

CUES Member \$12,095 / Nonmember \$15,145

When you have successfully completed Strategic Innovation Institute and all assigned course work, you'll have achieved Certified Innovation Executive (CIE) status. The CIE designation establishes a standard of education and excellence for credit union leaders. It signifies you have made a commitment to developing innovative and strategic vision, and obtained a level of expertise recognized throughout the credit union movement.

STANFORD GRADUATE SCHOOL OF BUSINESS | **Executive Education**

Strategic Growth Institute™

July 23–26

The University of Chicago Booth School of Business, Chicago

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.

CUES Member \$8,995 / Nonmember \$11,245



Executive Education

CUES' Schools

A close-up photograph of a person's hands in a dark suit writing on a document with a silver pen. The person is seated at a highly reflective glass table, and their hands and the pen are clearly reflected on the surface. In the background, other people and papers are visible but out of focus, suggesting a professional or educational setting.

Talent Development, Focused Content—CUES' Schools

CUES' schools are at the heart of our mission to educate and develop credit union talent among CEOs and future leaders. Each features top instructors with real-world knowledge, convenient locations, and short time spans. The curriculums go way beyond the surface, and deep into the matter at hand. Plus, each provides practical tools and ideas you can easily implement once you're home. Learn more at cues.org/canada.

CUES School of Applied Strategic Management™

April 30–May 3

Orlando, Fla.

Help your credit union—and your members—soar. Credit union managers along with fellow attendees, working as a team, will “run” a financial institution in the safety of a virtual environment.

CUES Member \$2,395 / Nonmember \$3,595

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. CEOs, vice presidents and managers of marketing, attend and learn the keys to strategy-focused marketing and data-driven decision making.

CUES Member \$1,995 / Nonmember \$2,995

CUES School of Strategic Marketing™ II

July 19–20

Seattle

CEOs, vice presidents and managers of marketing, build on the lessons of CUES School of Strategic Marketing I and learn how to increase returns on marketing investments through better allocation of marketing resources.

CUES Member \$1,995 / Nonmember \$2,995



Earn the prestigious Certified Strategic Marketing Executive (CSME)

designation by attending both segments and completing an assigned project.

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 they need to identify and respond to “weak signals” emerging opportunities and challenges that can make or break your payments strategy—and design offerings with your 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.

CUES Member \$1,295 / Nonmember \$1,945



Earn the Certified Payments Strategist (CPS)

designation when you complete all course work and CPS assigned projects.

CUES School of Enterprise Risk Management™

August 13–16

Denver

CEOs and vice presidents will explore ways to optimize risk management in key processes, improve and inform strategic planning and capital management using ERM, and improve financial performance—even in the face of risk-based capital.

CUES Member \$2,395 / Nonmember \$3,595

CUES School of Member Experience™

September 10–11

Denver

CEOs, vice presidents and managers will discover the knowledge and resources to build an outstanding member experience at every touch point.

CUES Member \$1,095 / Nonmember \$1,645

CUES School of IT Leadership™

September 12–14

Denver

CEOs and vice presidents will review critical areas of development such as building the IT organization around market forces, constructing a compelling IT culture that attracts top technical and business talent, and creating the processes and culture for rapid execution of change initiatives.

CUES Member \$1,095 / Nonmember \$1,645

CUES' Director Education

Strengthen Your Credit Union, Develop Your Board— CUES' Director Education

In addition to CUES' Center for Credit Union Board Excellence (CCUBE) and other online director courses, our director events provide ways to help boards run at their optimum. You'll find faculty and speakers of the highest caliber, covering topics vital to the health of your credit union. Plus, CUES offers something for every board member—veteran directors and newly elected alike—to help your board become stronger and more efficient. Learn more at cues.org/canada.

Execu/Summit®

March 11–16

Big Sky, Mont.

This meeting's unique schedule—bookending educational sessions around midday networking on the slopes—will leave executives and directors armed with the knowledge needed to take their organization's performance to the next level.

CUES/CCUBE/CUES Director Members \$1,745

Nonmember \$2,595

CUES Governance Leadership Institute™

Stateside:

April 15–18

Florida International University, Miami

Canada:

June 10–13

Joseph L. Rotman School of Management
University of Toronto

Directors and executives, strengthen your contributions to your credit union as you learn to balance healthy debate and diversity with consensus building at CUES Governance Leadership Institute.

CUES/CCUBE/CUES Director Members \$5,995

Nonmember \$7,495

Execu/Blend™

April 29–May 2

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. Afternoons are left free for you to explore Sonoma and network with your peers.

CUES/CCUBE/CUES Director Members \$1,745

Nonmember \$2,595

CUES Director Strategy Seminar

July 25–27

San Diego

Credit union strategic planning requires concentrated consideration throughout the year, not just at an annual weekend retreat. Attend and learn to cultivate strategy year-round, and to develop market-driven plans with solid underlying value propositions.

CUES/CCUBE/CUES Director Members \$1,395

Nonmember \$2,045

Execu/Net™

August 19–22

Sedona, Ariz.

Executives and directors can broaden their perspective, challenge themselves and try new things as our speakers guide them through powerful morning sessions, covering growth strategies, financial complexity, and innovation.

CUES/CCUBE/CUES Director Members \$1,645

Nonmember \$2,445

Board Chair Development Seminar

September 10–11

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, and gain the unique, advanced skill set you need to lead a high-performing board.

CUES/CCUBE/CUES Director Members \$1,295

Nonmember \$1,945

CUES Director Development Seminar

September 12–14

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.

CUES/CCUBE/CUES Director Members \$1,395

Nonmember \$2,045

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!

CUES/CCUBE/CUES Director Members \$795

Nonmember \$1,195

Directors Conference

December 2–5

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.

CUES/CCUBE/CUES Director Members \$1,495

Nonmember \$2,245

CUES' Conferences

A close-up photograph of a person's hands holding and interacting with a tablet computer. The person is wearing a dark business suit jacket over a light blue dress shirt. The background is blurred, showing what appears to be a conference or meeting setting with other people and papers.

Learn the Latest, Build Strong Connections— CUES' Conferences

You'll find vital topics and great networking opportunities at CUES' conferences, seminars and educational events. Considered among the best in the industry, we cover subjects you need to know, presented by the best speakers and instructors. And, you'll discover CUES' events are about much more than just learning; you'll also make connections with colleagues you can turn to for advice and camaraderie in the years to come. Learn more at cues.org/canada.

CUES Symposium

January 28–February 1

Koloa, Kauai, Hawaii

This CEO/chairman exchange offers a unique format allowing for a “meeting of the minds” as teams work to align their strategic vision through shared learning experiences. They will return home a stronger, more unified force.

CUES/CCUBE/CUES Director Members \$1,850*

Nonmember \$2,775*

CUES Member Team Price \$3,700*

Nonmember Team Price \$5,550*

Execu/Summit®

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CUES/CCUBE/CUES Director Members \$1,745

Nonmember \$2, 595

Execu/Blend™

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August 19–22

Sedona, Ariz.

Executives and directors can broaden their perspective, challenge themselves and try new things as our speakers guide them through powerful morning sessions, covering growth strategies, financial complexity, and innovation.

CUES/CCUBE/CUES Director Members \$1,645

Nonmember \$2,445

CEO/Executive Team Network™

Watch cues.org for dates and location.

This dynamic event focuses on growth opportunities. Designed for CEOs and senior managers, you'll learn from top speakers who examine strategy and leadership, thought-provoking sessions on the latest industry trends, lively discussions, and unparalleled networking opportunities.

CUES Member \$1,295 / Nonmember \$1,945

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December 2–3

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CUES/CCUBE/CUES Director Members \$1,495

Nonmember \$2,245

CUES Membership



You Belong

Memberships are available for executives, directors, future leaders and industry suppliers. Explore the possibilities, and then join forces with the nearly 14,000 international industry leaders who are already part of the CUES network. Visit cues.org/canada for detailed membership information.

Management Memberships

All memberships 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 industry 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.

Board Memberships

All credit union board memberships offer 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

CEOs and all individual board and committee members are included in this 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.

Individual Membership

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



CUES Learning Tracker

Record all your professional development activities in one easy-to-access location. Track everything from conferences, seminars, webinars and online classes, to magazine articles and more. Learn about this free benefit of membership at cues.org/clt.



CUES' Partnerships and Strategic Solutions

Beyond the Basics

CUES offers services and solutions uniquely suited to the needs of credit unions, all sizes and types. Our extensive industry partnerships provide support to you in meeting your human resources, governance, strategic planning and risk management objectives.

Davies Park Executive Search—Canada

Members, receive a 10% discount on services provided by this top Canadian executive search firm. Davies Park has offices throughout Canada, and more than 25 years experience placing senior leaders in the credit union and financial services sectors.

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.

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.

ServiStar® Member Experience Builder

Good service and product selling are not enough to grow membership or keep current members coming back for more. Your credit union must navigate toward a discernibly more convenient and customized member experience, and ServiStar can help.

Included with a CCUBE Membership!

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.

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.

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.

Learn more about all these offerings at cues.org/canada.



Davies Park

Executive Search—Canada

Davies Park is a leading recruitment firm with offices across Canada. Our unique process will find the perfect fit for your next executive role. Plus, you'll benefit from:

- Sound methodology
- Boutique service
- Unique knowledge and qualifications

Learn more now by visiting cues.org/DP!

CUES Members Benefit

CUES members receive a 10% discount on services provided by top Canadian executive search firm Davies Park.

daviespark
EXECUTIVE SEARCH



A Special Note for our Canadian Members

Thank you to all the Canadian CUES Members for the support in 2017 and making it a successful year for CUES in Canada.

With the support of John Pembroke, CUES' President/CEO, and the CUES board, we were able to hold four valuable governance programs in Canada in 2017. CUES Governance Leadership Institute™ was facilitated by the Rotman Faculty at the Asper School of Business in Winnipeg in March and at the Rotman Campus in Toronto in June. CUES also held the Board Chair Development and CUES Director Development Seminars in Vancouver in September. With the continued support of the Canadian market CUES will be able to continue its investment in Canada.

As we plan and budget for 2018 it will be more important than ever to ensure our credit union managers and board members have the education and support they need to face any challenges that lie ahead. Leadership and strategy development that arm our executives and managers with the skills to focus on the big picture, as well as leadership and governance education for our board members, will continue to be keys to the credit union systems' success.

CUES looks to you for your feedback in support of innovation and to help us create talent development offerings that meet current and future needs. We always look forward to hearing from you.

I am here to support you, so please reach out with questions and/or feedback.

Yours truly,



Leiha

Contact me today for all your talent development needs.

Leiha Fiddler

CUES' VP/Sales & Member Relations-Canada

604.559.4455 leiha@cues.org

cues.org/canada

CUES Brand

CUES is in the business of leadership potential. With a legacy of service spanning more than 50 years, we measure our success one leader at a time. As credit union leaders face uncharted territory and boundless challenges, CUES stands as the galvanizing force for our members to sharpen their skills. Because human potential is limitless, so too, is the value of CUES.

Our mission: to educate and develop credit union CEOs, directors and future leaders.

Our vision: CUES will help credit union leaders achieve their greatest potential, so they can strengthen credit unions and improve the financial lives of their members.

"I found CUES Governance Leadership Institute an excellent opportunity to collaboratively learn and network with other experienced credit union directors. The outstanding faculty both informed and challenged course participants. I would recommend this program to any experienced credit union director to enhance his or her effectiveness."

John Lamb, CCD

Board Chairman

SERVUS Credit Union

Edmonton, Alberta, Canada

Assets: \$14 billion



Printed on recycled paper with vegetable-based inks. Low VOCs.

Stay connected with CUES on:



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