

CUES Talent  
Development Guide for  
Canadian Credit Unions



# Unequalled. Unforgettable. Unmistakably CUES.

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# 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™

#### **Mergers, Acquisitions and Strategic Growth**

Mergers & Acquisitions 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](http://cues.org/canada).



## CEO Institute I: *Strategic Planning*

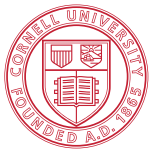
April 2–7, 2017

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 \$9,095 / Nonmember \$11,395**



JOHNSON  
Cornell University™

## CEO Institute II: *Organizational Effectiveness*

April 30–May 5, 2017

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 \$9,095 / Nonmember \$11,395**



UNIVERSITY  
of VIRGINIA

DARDEN SCHOOL OF BUSINESS  
EXECUTIVE EDUCATION

## CEO Institute III: *Strategic Leadership Development*

May 7–12, 2017

Summer Session: August 20–25, 2017

Darden School of Business, 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 \$9,095 / 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™

June 11–14, 2017

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

## Mergers & Acquisitions Institute™

June 26–29, 2017

University of Chicago Booth School of Business, Chicago

Directors and executives, attend and walk away with the tools to analyze strategic alternatives to mergers and acquisitions, develop evaluation strategies for buy versus build, develop an analytical framework for integrating the various stages of an acquisition, estimate the real cost of a merger or acquisition, and implement a strategy for integration and restructuring. Seating is limited for directors—board members, register early!

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



Executive Education

## Strategic Innovation Institute™

July 23–28, 2017

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.



Executive  
Education





# CUES' Schools

## 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](https://cues.org/canada).



## Payments University

**April 3–4, 2017**

San Francisco

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](http://cues.org/payments).



**Earn the Certified Payments Strategist (CPS)**

designation when you complete all course work and assigned projects.

## CUES School of Applied Strategic Management™

**May 1–4, 2017**

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 virtual environment.

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

## CUES School of Strategic Marketing™ I

**July 17–19, 2017**

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 20–21, 2017**

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.

## CUES School of Enterprise Risk Management™

**August 21–25, 2017**

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 18–19, 2017**

Orlando, Fla.

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 20–22, 2017**

Orlando, Fla.

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**

A photograph of a modern conference room. In the foreground, a long, polished wooden conference table is visible. Several black mesh office chairs are arranged around the table. The room has large floor-to-ceiling windows that offer a view of a bright, sunny outdoor area with greenery and a parking lot. The lighting is warm and natural, coming from the windows.

# 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](https://cues.org/canada).



## Execu/Summit®

**March 5–10, 2017**

Snowmass Village, Colo.

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 \$1,695**

**Nonmember \$2,545**

## CUES Governance Leadership Institute™

**June 11–14, 2017**

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**

## CUES Director Strategy Seminar

**July 26–28, 2017**

San Francisco

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 \$1,295**

**Nonmember \$1,945**

## Execu/Net™

**August 20–23, 2017**

Whitefish, Mont.

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 \$1,595**

**Nonmember \$2,395**

## Board Chair Development Seminar

**September 11–12, 2017**

Vancouver, British Columbia

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 13–15, 2017**

Vancouver, British Columbia

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 \$1,295**

**Nonmember \$1,945**

## Directors Conference

**December 10–13, 2017**

Marco Island, Fla.

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 Director Education Center for Canadian Credit Unions

Our recently updated online platform includes improved tracking and reporting features, in addition to enhanced, expanded, and interactive course offerings. The continuously expanding course list currently includes:

- **Board Authority**
- **Committees and Task Forces**
- **Strategic Planning**
- **Monitoring Performance**
- **Strategic Relationships and Mergers**

Visit [cues.org/candec](http://cues.org/candec) to start leveraging this updated membership benefit.

# CUES' Conferences



## 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](https://cues.org/canada).

## CUES Symposium

**January 29–February 2, 2017**

St. Thomas, U.S. Virgin Islands

This CEO/chairman exchange allows teams to converge for a meeting of their minds at this unique conference designed to align the strategic vision of your credit union's top team 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®

**March 5–10, 2017**

Snowmass Village, Colo.

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 \$1,695**

**Nonmember \$2,545**

## Execu/Net™

**August 20–23, 2017**

Whitefish, Mont.

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 \$1,595**

**Nonmember \$2,395**

## CEO/Executive Team Network™

**October 10–12, 2017**

Las Vegas

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**

## Directors Conference

**December 10–13, 2017**

Marco Island, Fla.

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 \$2,445**





# 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](https://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.

**Celebrating 30 Years  
of CUES Director Membership!**

## 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](http://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.

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### 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: Elect & Educate

CUES eVote is a convenient election and director education service all in one being utilized by a number of Canadian credit unions with great success. Choose to turn the entire process over to CUES, or administer the election yourself with our new budget-friendly, online-only option.

### Quantum Governance, L3C

Quantum Governance helps boards unravel their complicated roles and responsibilities, combine leading-edge governance with strategic thinking, and become an even greater asset to their credit unions.

### 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! *Self-Assessment for Credit Union Boards*

Is your board functioning at its best? Turn to CUES and find out—quickly, easily, and anonymously. With this online assessment tool, you'll discover areas of strengths, weaknesses, opportunities and threats—so your board knows what it has to work with, and what it needs to work on.

Learn more about all these offerings at [cues.org/canada](https://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!](https://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 everyone for your support over the past three years. It is the support of the Canadian credit union system that has allowed CUES to more than triple its membership, increase engagement and grow attendance at CUES offerings.

The CUES board and executives continue to reward our progress by listening to feedback, and investing in Canada. Two director seminars will be run in Vancouver in September 2017, and CUES continues to work with regulators across Canada to bring CUES Governance Leadership Institute to your province.

As you finalize your budgets for 2017 remember, that developing your people is one of the keys to long term sustainability as we face new and tougher challenges in the credit union movement. CUES has been very supportive of offering discounts on pricing to help offset the exchange rate where margins permit to ensure your leaders and board can leverage the amazing programs CUES offers in support of Canadian credit unions.

I enjoy hearing from you, so please continue to reach out with questions and feedback, or to book a credit union visit or presentation. I look forward to seeing everyone at the regional and national events over the next year.

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](http://cues.org/canada)**

*"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**

## 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.



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

Stay connected with CUES on:

