CUES 2019 Talent Development Guide for Canadian Credit Unions
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CUES Institutes—
Take Your Career To The Next Level

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. Learn more at cues.org/Institutes.

Which Institute is Right for You?

Choose your path:

- **Leadership and Strategy**
  CEO Institute

- **Innovation**
  Strategic Innovation Institute™ — Returning in 2020!

- **Growth Strategies and Mergers**
  Strategic Growth Institute™

- **Board Governance**
  CUES Governance Leadership Institute™
Advance Your Career
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/institutes.

CEO Institute I: Strategic Planning
April 7–12
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.
Member $11,495 CAD
Nonmember $13,245 CAD

CEO Institute II: Organizational Effectiveness
April 28-May 3
August 11-16
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.
Member $11,495 CAD
Nonmember $13,245 CAD

CEO Institute III: Strategic Leadership Development
May 5–10
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.
Member $11,495 CAD
Nonmember $13,245 CAD

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 2–5
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.
Member $7,495 CAD
Nonmember $8,620 CAD

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.

Strategic Growth Institute™
July 22–25
The University of Chicago Booth School of Business, Chicago, IL
Executives and directors, 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.
Member $8,745 CAD
Nonmember $10,055 CAD

Strategic Innovation Institute™
Returning in 2020! Stay tuned to cues.org/SII for details.
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.

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.
CUES Schools—Make Yourself More Marketable; Increase Your Skills.

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 curricula 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/Schools.
CUES School of Applied Strategic Management™
May 6–9
Orlando, FL
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.
Member $2,995 CAD
Nonmember $4,495 CAD

CUES School of Strategic Marketing™
July 15–18
Cleveland, OH
Effective marketing communicates your credit union's value, improves member experience and drives growth and profitability. Discuss the keys to strategy-focused marketing, data-driven decision making, and how to increase returns on marketing investments through effective allocation of resources.
Member $3,120 CAD
Nonmember $4,495 CAD

CUES School of Member Experience™
September 9–10
San Diego, CA
CEOs, vice presidents and managers will discover the knowledge and resources to build an outstanding member experience at every touch point.
Member $1,370 CAD
Nonmember $2,055 CAD

Payments University
September 11–12
San Diego, CA
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.
Member $1,620 CAD
Nonmember $2,430 CAD

Opportunity Is Knocking.
You don't have to go far to further your career. Getting ahead is right at your fingertips with CUES' online resources!
Explore cues.org now.

Digital Magazine* CUmanagement.com
Skybox Blog cues.org/Skybox
MyCUESApp cues.org/MyCues

Podcasts cues.org/Podcast
E-Newsletters cues.org/Enewsletters
Whitepapers* cues.org/Whitepapers

Webinars cues.org/Webinars

*Members-only benefit. Visit cues.org/membership to join today.
CUES Director Education—Strengthen Your Credit Union, Develop Your Board

In addition to CUES Center for Credit Union Board Excellence (CCUBE) and other online director education, 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/Directors.

Registration fees increase $400 45 days prior to the start of an event.
CUES Symposium
January 27–31
Nassau, Bahamas
CEO/chairman teams attend this unique conference together to align their strategic vision through shared learning experiences. CEOs and board chairs must attend together, but will return home a stronger, more unified force.
Member Team Price $4,625 CAD
Nonmember Team Price $6,940 CAD
Members $2,315 CAD
Nonmember $3,470 CAD

Execu/Summit®
March 10–15
Snowmass, CO
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.
Members $2,180 CAD
Nonmember $3,245 CAD

Execu/Blend™
April 28–May 1
Santa Rosa, CA
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.
Members $2,180 CAD
Nonmember $3,245 CAD

CUES Governance Leadership Institute™
June 2–5
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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.
Members $7,495 CAD
Nonmember $8,620 CAD

CUES Director Development Seminar
July 31–August 2
Monterey, CA
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.
Members $1,745 CAD
Nonmember $2,555 CAD

Execu/Net™
August 11–14
Big Sky, MT
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.
Members $2,180 CAD
Nonmember $3,245 CAD

Board Chair Development Seminar
September 16–17
Santa Fe, NM
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.
Members $1,620 CAD
Nonmember $2,430 CAD

CUES Director Strategy Seminar
September 18–20
Santa Fe, NM
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.
Members $1,745 CAD
Nonmember $2,555 CAD

Directors Conference
December 2–5, 2018
Waikoloa, Big Island, HI
December 8–11, 2019
Orlando, FL
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.
Members $1,870 CAD
Nonmember $2,800 CAD
CUES Conferences—Set Yourself and Your CU Up For Success

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/Conferences.
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Members $2,180 CAD
Nonmember $3,245 CAD

CEO/Executive Team Network™
Watch cues.org for 2019 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, attend thought-provoking sessions on the latest industry trends, and enjoy lively discussions and unparalleled networking opportunities.

Members $1,620 CAD
Nonmember $2,430 CAD

Directors Conference
December 2–5, 2018
Waikoloa, Big Island, HI
December 8–11, 2019
Orlando, FL
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.

Members $1,870 CAD
Nonmember $2,800 CAD
New for 2019!

CUES Membership—More is More!

The industry has evolved; we’re evolving, too! CUES has revamped and enhanced our memberships to better meet the needs of credit union executives, staff, and board members. All designed based on member feedback, you’ll find we’ve added more benefits and more resources, ultimately giving you and your credit union more value. Visit cues.org/Membership for more detailed information.
CUES Membership

Our new simplified memberships give you the ultimate in flexibility. Choose from:

**Individual:**
Any staff or board member can join on their own.

**Unlimited,** and **Unlimited+:**
With one flat membership rate, anyone at your credit union can become a member—all staff, executive team, and board members included.

Take a look at our new membership benefits today; you’ll find we offer everything you need to develop professionally and create a stronger credit union.

### Membership Benefits

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<tr>
<th>Membership</th>
<th>UNLIMITED</th>
<th>UNLIMITED+</th>
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<tr>
<td>Individual</td>
<td>CUESNet™, powered by Higher Logic</td>
<td>Free &amp; improved!</td>
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<td>Members Share</td>
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<td>CUES Learning Portal, powered by Degreed</td>
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<td>Credit Union Management™ magazine</td>
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<td>CUES Guide to Effective Mentorship</td>
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<td>CUES Councils (special member pricing)</td>
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<td>Director Education Center</td>
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<td>CUES Webinar Series</td>
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<td>Special Member Pricing</td>
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<td>CUES Leadership Development Guide</td>
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<td>Director Onboarding Tool Kit</td>
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<td>CUES Elite Access™ Virtual Classroom</td>
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<td>Center for Credit Union Board Excellence (CCUBE)</td>
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<td>Board Governance Assessment</td>
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### Membership Dues

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<th>Credit Union Staff</th>
<th>Credit Union Directors</th>
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<tr>
<td><strong>CUES Individual Membership</strong></td>
<td>$1,095 CAD</td>
<td>$595 CAD</td>
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<tr>
<td><strong>CUES Unlimited Membership</strong></td>
<td>$3,995 CAD</td>
<td>$5,995 CAD</td>
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<tr>
<td>&lt; $99M in assets</td>
<td>$100M–$499M</td>
<td>$500M–$1B</td>
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<tr>
<td>&gt; $1B</td>
<td>$8,395 CAD</td>
<td>$8,895 CAD</td>
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<tr>
<td><strong>CUES Unlimited+ Membership</strong></td>
<td>$4,495 CAD</td>
<td>$6,495 CAD</td>
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<tr>
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<td>$100M–$499M</td>
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<tr>
<td>&gt; $1B</td>
<td>$8,395 CAD</td>
<td>$8,895 CAD</td>
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### Join Today!

When you’re planning and budgeting for 2019, be sure to think about how CUES Membership can help develop everyone at your CU, including your:

- CEO
- Executive teams
- Board chair
- Board liaison
- Directors
- Committee members
- High potentials
- Managers

Then, contact Leiha Fiddler, CUES VP/Sales & Member Relations—Canada, by calling 604.559.4455, or by emailing leiha@cues.org, to become a member!
CUES Partnerships and Strategic Solutions—The Tools You Need To Succeed

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.

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.

CUES Consulting
Strengthen your leadership pipeline by providing your staff with direction and focus to support their growth as leaders within your credit union. CUES will evaluate high potential candidates, and create individual development plans to drive results aligned with your credit union’s strategy and goals.

CUES eVote™
Utilized by a number of Canadian credit unions with great success, 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.

Director Skills Assessment
Improve board recruitment and focus training resources by evaluating individual and collective capabilities among your board members to pinpoint skill set gaps in five key areas.

Leaders International Executive Search—Canada
Members: receive an 18 month guarantee and a 10% discount on professional services provided by this top Canadian executive search firm. Leaders International has offices throughout Canada, and more than 25 years experience placing senior leaders in the credit union and financial services sectors.

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® Consulting Member Experience Builder and Selling Solutions
Each develops a member-centered organizational culture and provides resources to ensure lasting needs-based selling behavior and performance. Both models are comprehensive, customizable, and maximize employee engagement, member experience, and profitability.

Vertex Management Development Program
This research based, year-long program can be customized to each manager’s assessed needs and help them develop the key skills common among the highest performing credit union managers. You’ll also learn ways to deploy those skills that will immediately improve management performance, employee engagement, member service and profitability.

Learn more about all these offerings at cues.org/Canada.
Leaders International
Executive Search—Canada

Leaders International is a top 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 by visiting cues.org/ExecSearch!

CUES Members Benefit
CUES members receive a 10% discount on services provided by top Canadian executive search firm Leaders International.
A Special Note for our Canadian Members

Thank you to all the Canadian CUES Members for the support in 2018 and making it another successful year for CUES in Canada.

The Canadian Division launched this summer and went live on our website (cues.org) in early September. All Canadian relevant offerings now show prices in Canadian dollars and can be purchased on the website using a Canadian credit card. If credit unions prefer to be invoiced, it can be paid in CAD via a Canadian credit union. All of this would not be possible with the support of all our Canadian CUES members and as I have promised all along, with the continued support of the Canadian market, CUES will be able to continue its investment in Canada.

Based on member feedback CUES also launched its new membership structure including improved benefits that will help support credit unions in the development of their team; new tools to support young and emerging leaders, seasoned executives and directors and an open platform that will encourage and enable learning. The new Unlimited and Unlimited+ group memberships have been priced at par for our Canadian credit unions and include an unlimited amount of staff and board members. Reach out to me for more information.

As we plan and budget for 2019 it will be more important than ever to ensure our credit union staff and board members have the education and support they need to face any challenges that may lie ahead. I am hopeful that having access to Canadian dollar pricing will help remove some of the uncertainty in budgeting for CUES education. Canadian engagement in CUES programs continues to rise and the feedback remains consistently positive.

CUES looks to you for your feedback in support of innovation and to help us create talent development offerings that meet current and future member needs. Members gave us feedback about membership and CUES listened. 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 Fiddler
CUES VP/Sales & Member Relations–Canada
604.559.4455 • leiha@cues.org
cues.org/Canada

Contact me today for all your talent development needs.

Who We Are

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. We promise to be the undisputed source for our members to reach their full leadership potential, ultimately transforming the credit union industry.

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