



*Johnson Graduate School of
Management, Cornell University*

2020 CEO Institute

The Measure By Which
All Others Will Be Compared



*Darden School of Business,
University of Virginia*



Tara Graff, CCE

SVP/Marketing/Business Development
Hiway Federal Credit Union
Saint Paul, MN
Assets: \$1.1 billion

"Each week, I not only strengthened my knowledge as a leader from the academic, "best practices" perspective, but I learned a lot about my own leadership gifts and how to best apply them. The hands-on experiences, in particular the Customer Centricity exercise at Wharton, provided valuable takeaways that were immediately applicable to my organization.

In CEO Institute, you learn not only the what of great leadership, but the all-important how. As a newer executive, I returned to my credit union with increased confidence and a strong enthusiasm well worth the investment."

CEO Institute: Your Future is Waiting

As a credit union leader you're expected to exceed members' needs, be strong community partners, and meet regulatory requirements—all while keeping your institution financially sound.

The prestigious CUES CEO Institute combines the faculty, facilities and resources of the nation's top business schools into an unparalleled educational program that will prepare you to advance your credit union and career, and excel at any challenges and opportunities you face.

As a graduate of this transformational program, you'll leave equipped with a comprehensive understanding of leadership issues and approaches that will immediately benefit your credit union. With enhanced strategic thinking skills, you'll be able to:

- Effectively make decisions
- Better manage change
- Improve business processes

CEO Institute consists of a series of one-week sessions held over three years, supplemented with pre-reading, homework assignments, and project work that add considerable value to your interactive learning experience. Attendees can include:

- CEOs
- SVPs and VPs
- Future Leaders

This is a fantastic opportunity to attend three competitive business schools—all have acceptance rates of 25% or lower!

Year over year, our business school partners are ranked among the top 15 in the U.S.!

Johnson Graduate School of
Management, Cornell University

Overview

CEO Institute I: *Strategic Planning*
The Wharton School
University of Pennsylvania



Highlights: scenario planning, customer-centricity simulation, strategic segmentation

Year I Project

Give back to your credit union by completing a scenario planning project specific to your organization.

CEO Institute II: *Organizational Effectiveness*
Samuel Curtis Johnson Graduate
School of Management
Cornell University



JOHNSON
Cornell University™

Highlights: change management, negotiation techniques, effective group performance and processes

Year II Project

Apply the lessons you learned in organizational effectiveness to a business challenge or opportunity for your credit union.

CEO Institute III: *Strategic Leadership Development*
UVA Darden Executive Education



DARDEN
Executive Education

Highlights: Leadership Practices Inventory (LPI), diversity and inclusion, managing change, motivation techniques

Become a Certified Chief Executive

When you have successfully completed all three weeks of CEO Institute and two between-segment action-learning assignments, you'll have achieved Certified Chief Executive (CCE) status.



The CCE designation establishes a standard of education and excellence for credit union leaders. It signifies you have made an ongoing commitment to your professional development and obtained a level of expertise recognized throughout the credit union movement.

The Impact of Earning Your CCE

Credit unions realize the value of the CCE designation, and they're willing to pay for it. Recent statistics released by Industry Insights indicate credit union executives holding the CCE designation make more than their peers without it.

The study showed CFOs with the designation typically earn a 23% premium; COOs, a 14.8% premium; and CEOs, a 6.3% premium.

Beyond the Designation

Earning your Certified Chief Executive (CCE) designation once you complete all elements of CEO Institute is a significant accomplishment, but you'll reap rewards in other ways, too.

- You'll be joining a unique and tightly allied fellowship of credit union leaders. CEO Institute graduates form strong bonds, and tend to stay in contact with each other year after year, creating a powerful network of successful professionals.
- Your credit union will benefit directly, thanks to the in-between segment projects you'll complete.
- You'll benefit from an executive education program developed specifically for credit unions.
- All classes are taught by world-class professors, authors, and researchers.
- Many of the esteemed CEO Institute faculty are there for you even after graduation, offering another level of support.
- You'll earn up to 39 Continuing Professional Education (CPE) credits each week.



2019 CEO Institute I Graduates

Curriculum

CEO Institute I: *Strategic Planning*

March 29–April 3, 2020
The Wharton School
University of Pennsylvania
Philadelphia, PA

[#cueswharton](#)



Challenges in the financial services marketplace are inevitable—how you respond is what sets you apart. At CEO Institute I, learn to manage change, and remain an agile, future-focused leader.

Prestigious Wharton School faculty will show you how to harness change, and redirect uncertainty to your advantage. You'll also develop strategies to meet challenges head on, transforming them into positive experiences for your credit union.

Through effective strategic planning, you'll gain an advantage over your competitors, and develop a successful path for your credit union. You'll discover it's not enough to "do things right;" you need to "do the right things," which requires you to step back, look at the big picture and develop an effective strategic plan.

At CEO Institute I, you'll examine the following topics in depth:

- Understanding scenario planning
- Maintaining a competitive advantage in changing times
- Developing strategic segmentation
- Business model innovation
- Formulating and focusing your vision
- Applying customer-centricity to the credit union members simulation
- How to create powerful loyalty leading to life-long members

Following CEO Institute I, you'll apply what you've learned to real-world conditions at your own credit union with a post-segment assignment.

For complete curriculum descriptions, as well as faculty and campus information, visit cues.org/Inst1.



*The Wharton School,
University of Pennsylvania*



George Chacon

AVP/ Corporate Strategy
Bethpage Federal Credit Union
Assets: \$8.4 billion

"I am still amazed at how this program was able to integrate all the concepts and layer them on top of real life situations. The week was filled with tools that I have already begun to apply. After only one week, I am well equipped to influence and drive change in my organization."



2019 CEO Institute II Graduates

Curriculum

CEO Institute II: *Organizational Effectiveness*

April 26–May 1, 2020
 Samuel Curtis Johnson Graduate
 School of Management
 Cornell University
 Ithaca, NY

[#cuescornell](https://twitter.com/cuescornell)



JOHNSON
 Cornell University™

In business, as in life, nothing happens in a vacuum. The solutions leaders develop in response to challenges inevitably impact more people and departments than anticipated, no matter how well planned.

CEO Institute II explores the development of cross-functional awareness and aptitude. Reach beyond your area of expertise by involving cross-functional teams in your credit union's planning process.

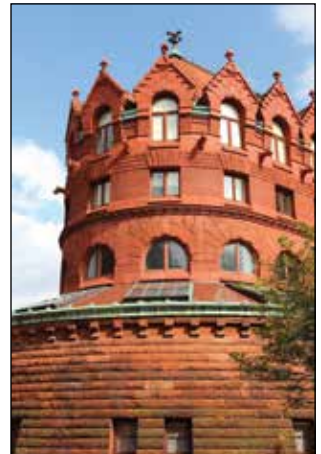
Comprehensive sessions on change, negotiation, business process redesign, effective group study and performance, and the art of giving constructive feedback will transform the way you elicit support and implement change.

At CEO Institute II, take your skills to the next level by focusing on managing change and organizational effectiveness at your credit union. You'll cover the following topics in depth:

- Behavioral insights
- Negotiating for resources and building alliances
- Exploring the intense process of change
- Business process redesign
- Human resources—your most valuable asset

Following CEO Institute II, you'll apply what you've learned to a change management project at your own credit union with a post-segment assignment.

For complete curriculum descriptions, as well as faculty and campus information, visit **cues.org/Inst2**.



Cornell University

*Johnson Graduate School of
Management, Cornell University*



Charles Purvis, CCE, CLE, CUDE

President/CEO
Coastal Credit Union
Raleigh, NC
Assets: \$3.1 billion

"I am a graduate of CUES CEO Institute, which is a fabulous program, and I'll be rotating some of my key execs through the program within the next couple years."

Curriculum

CEO Institute III: *Strategic Leadership Development*

May 3–8 or August 2–7, 2020
UVA Darden Executive Education
Charlottesville, VA

#cuesdarden



DARDEN
Executive Education

CEO Institute III brings you to the height of your professional leadership development by focusing on personal discovery.

Your leadership becomes more powerful when you fully understand your capabilities and release your untapped potential. Uncover the reasons why you lead the way you do, and learn new ways to become even more effective.

This segment uses case studies to identify problems, define alternatives, analyze data, and outline a new course of action. You'll review some of the most powerful illustrations of organizational leadership in history, determine what sets these leaders apart, and discover how they overcame tremendous obstacles in their own careers.

CEO Institute III will get to the core of who you are as a leader, and show you how to become even more effective. A 360-degree feedback instrument gives you a comprehensive perspective of your skills and developmental needs, and assists you in building a future career path. This interactive tool is guaranteed to bring out your untapped leadership potential.

The curriculum at CEO Institute III covers the following topics in depth:

- The art of creating values
- Diversity and inclusion
- Core principles of leadership
- Leading through change
- How to gain active support
- Leadership reflection and commitment
- Leadership Practices Inventory (LPI)

For complete curriculum descriptions, as well as faculty and campus information, visit **cues.org/Inst3**.



2019 CEO Institute III Graduates

CUES Institutes: The Original and Still the Best

CEO Institute launched in 1995, and it quickly became the gold standard for credit union executive education industry-wide.

Its winning formula is now the touchstone for our other institutes—partner with prominent business schools to develop curriculum specifically for the industry, and offer top executive-level education, taught by esteemed faculty, to credit union leaders and directors.

Don't wait to enhance your career and create a profitable future for your credit union! Learn more about CUES CEO Institute today at **cues.org/Institutes**, or by contacting Teresa Brogan, CUES' Executive Education Specialist, at **800.252.2664** or 608.271.2664, **ext. 331**; or **teresab@cues.org**.

Tuition for each week of CEO Institute is \$9,295 for members/\$10,695 for nonmembers, and includes:

- Classroom instruction at world-renowned universities
- Executive accommodations
- Class materials
- Most meals

Make Your Plans Early

Each week of this program sells out quickly. Register early to ensure your spot.



2020 CEO Institute

CUES' mission is to educate and develop credit union CEOs, executives, directors and future leaders.

Send Your Staff to CEO Institute!

As a past attendee, you know the value this prestigious educational opportunity brings to the industry. Send the brightest future leaders at your credit union to CEO Institute in 2020 to deepen bench strength and ensure your employees are ready to take on leadership roles.

Don't wait to register your staff! CEO Institute sells out every year.



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2020 CEO Institute

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Your Opportunity to Attend Three Top Business Schools!

CEO Institute is a prestigious three-year program combining the facilities, facilities and resources of the nation's top business schools into an unparalleled educational opportunity. You'll leave equipped with a comprehensive understanding of leadership issues and approaches that will immediately benefit your credit union.

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