



# CUES Governance Leadership Institute™

Find Your Voice in the Board Room

**Joseph L. Rotman**  
**School of Management**  
University of Toronto  
June 7–10, 2020



# Build a High-Performing Board

CUES Governance Leadership Institute™ features an intense curriculum focusing on issues at the organizational level. Developed specifically for the credit union industry, this prestigious program was designed for executives and directors alike.

Learn how highly effective credit union boards operate, and take a page from the best practices they employ. Rotman School of Management faculty will cover:

- Creating value in competitive settings
- Duties, risks and liabilities of directors and executives
- Effective and powerful negotiation skills
- The roles senior executives and board members play in managing and influencing organizational change
- Behaviors that lead to positive exchanges
- Self-assessment for the full board and individual directors

We've also included ample discussion time for topics attendees have specifically requested.

**Providing the Best Director Education to the Industry for more than 10 years.**





Rotman School of Management  
UNIVERSITY OF TORONTO

## The History

For over 10 years, CUES Governance Leadership Institute was developed to help credit union directors better understand their ever-increasing fiduciary roles and responsibilities. After launching in 2009, it quickly became a vital educational component for credit union board members and executives alike.

## The Takeaway

When choosing an executive education program, it's important to consider what you'll get in return.

CUES' executive education offerings are developed in conjunction with world-renowned universities and represent the highest quality professional development in the credit union industry; CUES Governance Leadership Institute is no exception. Taught by the esteemed Joseph L. Rotman School of Management faculty, and covering topics from strategy to governance responsibilities, this powerful learning experience helps you become a stronger contributor to your credit union, and better understand your fiduciary responsibilities.

## The Impact

Attendees who complete CUES Governance Leadership Institute and an in-class reflection assignment 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. More than 873 industry professionals have earned their CCD.



## Earn Credits for Attending

- Earn up to 27 CPE Credits
- Program Level: Overview
- Delivery Method: Group-Live
- Field of Study: Business Management & Organization
- Advanced Preparation: some advance preparation is required
- Prerequisites: None



CUES is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors, through its website [www.nasbaregistry.org](http://www.nasbaregistry.org).



# The Curriculum

At this highly interactive institute, you'll examine industry-specific case studies. The class will break into groups, each acting as board members facing ethical, risk-based, and strategic issues. Together, you'll work on a project applying what you've learned, so you'll head home practiced and ready to go.

## Duties, Risks and Liabilities

Examine the responsibilities of directors and executives, specifically relating to these uncertain financial times. You'll:

- Examine the role of executives and the fiduciary duties of directors
- Explore liability

## Negotiating During Decision-Making

Learn a practiced approach to managing information exchanges between board members and management. Discover:

- Ways to negotiate more effectively
- How information should flow between management and the board

## Influencing Change

Explore the roles senior executives and board members play in managing and influencing organizational change. You'll:

- Identify causes of sub-optimal information sharing in decisions
- Recognize the need for, and describe tactics for engaging in, constructive conflict in discussions
- Employ six scientific principles of persuasion and influence

## Developing Effectiveness

Take part in a collaboration game to experience behaviors that lead to positive and negative exchanges. Learn to:

- Identify processes and tools you can use to increase effectiveness
- Consider the role of evaluations, and how they can enhance team dynamics

## Board and Director Self-Assessment

Discuss several approaches to evaluating board and individual director effectiveness. Develop a framework for selecting new directors and recognize the socio-political complexities characterizing boards. You'll:

- Gain new insights into selecting directors
- Explore in-depth frameworks for making the selection



2019 CUES Governance Leadership Institute Graduates



**Paul Cuthbert, CCD**  
Chair of the Board  
Noventis Credit Union  
Gimli, Manitoba, Canada  
Assets: \$528 million

"I had the privilege of attending the CUES Governance Leadership Institute at the Rotman School of Management. This intensive three day institute was, in my opinion, the highest quality professional learning I have attended related to my role as a credit union director in my eighteen years I have served on a board. The institute faculty were world class in terms of their knowledge and experience with the credit union system and corporate governance. The balance of theory, practical application and case studies working in collaboration with colleagues from across North America provided all participants with a solid foundation in governance, and left us with many new ideas to consider for implementation in our credit unions. I would consider this institute a "must attend" for any director considering a leadership role on their board."

## The Lead Faculty



**Richard C. Powers, B.A., B.P.H.E., MBA, LL.B.**

Powers teaches in Rotman's Executive MBA, OMNIUM, MBA and Executive Education Programs. He is also the National Academic Director of The Directors Education Program and the Not-For-Profit Governance Essentials Program, in partnership with the Institute of Corporate Directors-ICD.

After receiving his MBA and L.L.B from Queen's University, Powers worked as a corporate lawyer for a national Canadian law firm. He later served as corporate counsel for Honda Canada Inc., before joining the University of Toronto. After teaching and serving in several administrative roles at the University of Toronto at Scarborough, Powers joined the Rotman School of Management in 2005. He has recently completed a five year term as the Associate Dean and Executive Director of the Rotman MBA and Master of Finance Programs.

A recipient of numerous teaching and student awards, Powers received the Dean's Award for Excellence in Teaching at the Rotman School of Management in January 2013.

For Powers' complete biography and information about other CUES Governance Leadership Institute faculty, visit [cues.org/GLI2020](https://cues.org/GLI2020).

## The Details

### Tuition

Tuition is \$5,995 for members and \$6,895 nonmembers in the U.S.; in Canada, the rate is \$7,645 for members and \$8,790 for nonmembers. It covers:

- Educational sessions & materials
- Sunday welcome reception and dinner
- Breakfasts and Lunches
- All refreshment breaks

### Hotel Information

Rates at the Kimpton Saint George are \$299 (CAD) per night for single/double occupancy plus tax. Make your **hotel reservations prior to May 15, 2020** by calling **877.660.8550**. Be sure to mention you are with the CUES Governance Leadership Institute 2020 block or mention Group Code J22.







CUES Governance Leadership Institute sells out each year, so be sure to reserve your spot early!

## 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.

Since then, all CUES Institutes have followed the same winning formula: partner with prominent business schools to develop a curriculum specifically for the industry, and offer top executive-level education, taught by esteemed faculty, to credit union leaders and directors.

Enhance your role in the board room, and create a profitable future for your credit union! Register for CUES Governance Leadership Institute today at [cues.org/GLI2020](https://cues.org/GLI2020), or by contacting Teresa Brogan, CUES' Executive Education Specialist, at **800.252.2664** or 608.271.2664, **ext. 331**; or [teresab@cues.org](mailto:teresab@cues.org).



# CUES Governance Leadership Institute™

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



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