



*Montreal, Quebec, Canada*

# 2020 Talent Development Guide for Canadian Credit Unions



CUES Membership			
CUES Membership	Visit <a href="https://cues.org/Membership">cues.org/Membership</a> for details!		4
CUES Institutes			
CEO Institute I: <i>Strategic Planning</i>	The Wharton School, University of Pennsylvania	March 29–April 3	7
CEO Institute II: <i>Organizational Effectiveness</i>	Samuel Curtis Johnson Graduate School of Management Cornell University	April 26–May 1	7
CEO Institute III: <i>Strategic Leadership Development</i>	UVA Darden Executive Education	May 3–8 or August 2–7	7
CUES Governance Leadership Institute™	Joseph L. Rotman School of Management University of Toronto	June 7–10	8
Strategic Innovation Institute™	Stanford Graduate School of Business Stanford University	July 12–16	8
CUES Schools			
CUES School of Applied Strategic Management™	Orlando, FL	April 27–30	9
CUES School of Strategic Marketing™	Cleveland, OH	July 20–23	9
CUES Conferences			
CUES Symposium	Kohala Coast, Big Island, HI	February 9–13	11
Execu/Summit®	Park City, UT	March 8–13	11
Execu/Blend™	Santa Barbara, CA	June 7–10	11
Execu/Net™	Jackson Hole, WY	August 30–September 2	11
CEO/Executive Team Network™	Austin, TX	November 2–4	11
Directors Conference	Palm Desert, CA	December 6–9	11
CUES Director Education			
CUES Symposium	Kohala Coast, Big Island, HI	February 9–13	13
Execu/Summit®	Park City, UT	March 8–13	13
Execu/Blend™	Santa Barbara, CA	June 7–10	13
CUES Governance Leadership Institute™	Joseph L. Rotman School of Management University of Toronto	June 7–10	13
Board Chair Development Seminar	Montreal, Quebec, Canada	July 13–14	13
Director Development Seminar	Montreal, Quebec, Canada	July 15–17	13
Execu/Net™	Jackson Hole, WY	August 30–September 2	13
Director Strategy Seminar	Nashville, TN	September 23–25	13
Directors Conference	Palm Desert, CA	December 6–9	13
CUES Partnerships and Strategic Solutions			
CUES Partnerships and Strategic Solutions	Learn more about CUES offerings at <a href="https://cues.org/Products">cues.org/Products</a> .		14





## 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.

## A Special Note

Thank you to all our Canadian CUES members for your support in 2019! You made it another successful year for CUES in Canada.

CUES Canadian Division has been up and running for over a year now and the availability of Canadian pricing and payment options has received great feedback from our members. We have also added a new resource for the Canadian market to better serve our members. Tanya Mueller Smith joined CUES in January 2019 as the Manager, Member Relations & Sales Support—Canada.

As CUES continues to grow its Canadian presence, we are continuing to look at ways to bring more content to Canadian locations. Watch my monthly newsletter for updates on special Canadian offerings—in addition to those already included in our 2020 Calendar of Events.

The new CUES membership benefits and structure was very well received in Canada this past year. CUES Membership continues to grow, and as credit unions learn how to utilize all the new benefits, engagement continues to increase. Group memberships will continue to be offered at par for Canadian credit unions in 2020.

I am already booking credit union visits and events for 2020. Please reach out to me if your credit union would like an in-person visit or video conference session.

Again, all of this would not be possible without the support of our Canadian CUES members, so please contact me with any feedback or questions you may have. I always love to hear from you!

Yours truly,



A stylized, handwritten signature in black ink.

Leiha Fiddler  
VP Sales & Member Relations—International  
604.559.4455 • [leiha@cues.org](mailto:leiha@cues.org)



## CUES Membership

### More is More

Designed based on member feedback, you'll find a CUES Membership has more benefits and resources than ever before, ultimately giving you and your credit union more value. Visit **[cues.org/Membership](https://cues.org/Membership)** for more detailed information and to begin networking with over 22,000 of your peers.



MEMBERSHIP BENEFITS	INDIVIDUAL CU staff or directors	UNLIMITED For all CU staff and directors	UNLIMITED+ For all CU staff and directors
CUES Learning Portal, powered by Degreed			
CUESNet™			
<i>Credit Union Management</i> ™ magazine			
Guide to Effective Mentorship			
CUES Councils (special member pricing)			
CUES Director Education Center			
Webinar Series			
Discounted Event Pricing			
Leadership Development Guide			
Director Onboarding Tool Kit			
Elite Access™ Virtual Classroom			
Governance+			
Board Governance Assessment			

## MEMBERSHIP DUES

### Individual CUES Membership

Credit Union Staff	\$1,140 CAD
Credit Union Directors	\$630 CAD

### CUES Unlimited Membership

Assets \$0-\$249M	\$3,995 CAD
Assets \$250-\$499M	\$5,995 CAD
Assets \$500-\$1B	\$7,195 CAD
Assets \$1B	\$8,395 CAD

### CUES Unlimited + Membership

Assets \$0-\$249M	\$4,495 CAD
Assets \$250-\$499M	\$6,495 CAD
Assets \$500-\$1B	\$7,695 CAD
Assets \$1B	\$8,895 CAD

## Choose From:

### Individual:

Available to credit union staff and board members, this tier offers a basic set of benefits—including CUES Learning Portal, CUES Director Education Center, event discounts, and *Credit Union Management*™ magazine—at a great price.

### Unlimited and Unlimited+:

With one flat membership rate, everyone at your credit union can become a member—including all staff, your executive team, and board members. Both tiers feature enhanced benefits, and offer great ways to bring talent development to everyone at your credit union.

## Join Today!

When you're planning and budgeting for 2020, be sure to think about how CUES Membership can help develop everyone at your CU, including your:

- CEO
- Directors
- Executive Teams
- Committee Members
- Board Chair
- Staff
- Board Liaison
- Managers

Then, contact Leiha Fiddler, CUES VP Sales & Member Relations—International, by calling **604.559.4455**, or by emailing **leiha@cues.org**, to become a member!





*The Wharton School,  
University of Pennsylvania*

## 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 faculty 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™

**Board Governance**

CUES Governance Leadership Institute™

**Growth Strategies and Mergers— [Returning in 2021!](#)**

Strategic Growth 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.



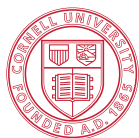
### CEO Institute I: *Strategic Planning*

**March 29–April 3**

**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. Learn more at [cues.org/INST1](https://cues.org/INST1).

**Member \$11,850 CAD    Nonmember \$13,635 CAD**



**JOHNSON**  
Cornell University™

### CEO Institute II: *Organizational Effectiveness*

**April 26–May 1**

**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. Learn more at [cues.org/INST2](https://cues.org/INST2).

**Member \$11,850 CAD    Nonmember \$13,635 CAD**



**DARDEN**  
Executive Education

### CEO Institute III: *Strategic Leadership Development*

**May 3–8 OR August 2–7**

**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. Learn more at [cues.org/INST3](https://cues.org/INST3).

**Member \$11,850 CAD    Nonmember \$13,635 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 7–10

**Joseph L. Rotman School of Management, University of Toronto**

Directors and executives, strengthen your boardroom contributions as you learn to balance healthy debate and diversity, as well as execute your fiduciary responsibilities. Learn more at [cues.org/GLI](https://cues.org/GLI).

**Member \$7,645 CAD    Nonmember \$8,790 CAD**



**Rotman School of Management**  
**UNIVERSITY OF TORONTO**



Attendees 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 Innovation Institute™

July 12–16

**Stanford Graduate School of Business, Stanford University**

Credit union executives and future leaders will learn to embrace innovation and become successful agents of change. Graduates of this robust, transformational program are well equipped with a comprehensive understanding of innovation that benefits their credit unions immediately. Learn more at [cues.org/SII](https://cues.org/SII).

**Member \$13,510 CAD    Nonmember \$15,550 CAD**

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



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.

## Strategic Growth Institute™

**Available Again in 2021**

**Booth School of Business, University of Chicago**

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. Learn more at [cues.org/SGI](https://cues.org/SGI).



**Executive Education**





## 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. Each curriculum goes way beyond the surface, diving deep into the matter at hand. Plus, each provides practical tools and ideas you can easily implement once you're home.

### CUES School of Applied Strategic Management™

**April 27–30  
Orlando, FL**

Help your credit union—and your members—soar. We'll start with an Asset Liability Management (ALM) overview to get everyone on the same page. Then, working as a team, attendees will gain hands-on experience "running" a financial institution in the safety of a virtual environment. Learn more at [cues.org/SASM](https://cues.org/SASM).


**Member \$3,180 CAD    Nonmember \$4,585 CAD**

### CUES School of Strategic Marketing™

**July 20–23  
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 ROI through effective allocation of resources. Learn more at [cues.org/SOSM](https://cues.org/SOSM).

**Member \$3,180 CAD    Nonmember \$4,585 CAD**



Earn the prestigious Certified Strategic Marketing Executive (CSME) designation by attending and completing an in-class project.



## 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.

## CUES Symposium

**February 9–13**

**Kohala Coast, Big Island, HI**

Align the strategic vision of your top team through shared learning experiences. At this unique event, CEOs and board chairs must attend together, but will return home a stronger, more unified force. Learn more at [cues.org/SYMP](https://cues.org/SYMP).

**Member Team \$4,720 CAD Nonmember Team \$7,010 CAD**

Additional registrants are \$2,360 CAD for CUES Members and \$3,505 CAD for non-members.

## Execu/Summit®

**March 8–13**

**Park City, UT**

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. Learn more at [cues.org/ES](https://cues.org/ES).

**Members \$2,290 CAD Nonmember \$3,310 CAD**

## Execu/Blend™

**June 7–10**

**Santa Barbara, CA**

Explore strategic development and differentiation. Discover how to set a robust strategy, and the power of storytelling in innovative leadership. We'll also take a trip to a local winery to hear their story and learn how they differentiate themselves in a highly competitive market. Learn more at [cues.org/EB](https://cues.org/EB).

**Members \$2,095 CAD Nonmember \$3,115 CAD**

## Execu/Net™

**August 30–September 2**

**Jackson Hole, WY**

Executives and directors, broaden your perspective, challenge yourself and try new things as our speakers guide you through powerful morning sessions, covering growth strategies, financial complexity and innovation. Each afternoon network with peers and nature for a fresh perspective. Learn more at [cues.org/EN](https://cues.org/EN).

**Members \$2,095 CAD Nonmember \$3,115 CAD**

## CEO/Executive Team Network™

**November 2–4**

**Austin, TX**

This dynamic conference, designed for CEOs and senior executives, focuses on growth opportunities. You'll learn from top speakers who examine strategy and leadership, participate in thought-provoking sessions on the latest industry trends and enjoy unparalleled networking. Learn more at [cues.org/CNET](https://cues.org/CNET).

**Members \$1,650 CAD Nonmember \$2,480 CAD**

## Directors Conference

**December 6–9**

**Palm Desert, CA**

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. Learn more at [cues.org/DC](https://cues.org/DC).

**Members \$2,095 CAD Nonmember \$3,055 CAD**

## Check out CUESNet

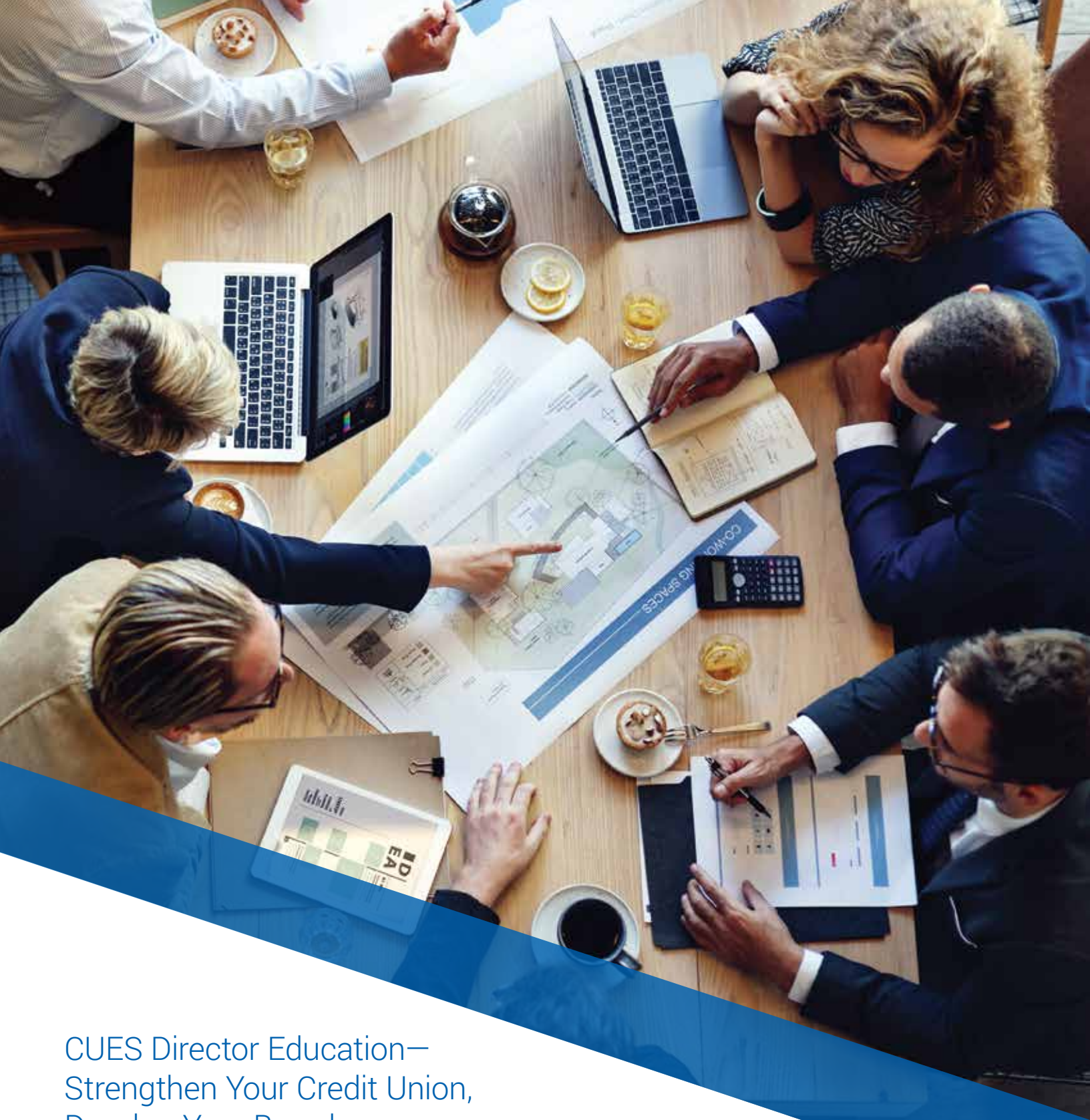
CUESNet is a website-based collaboration tool dedicated to helping CUES members easily connect and share with others.

We're pleased to offer several groups within CUESNet dedicated to different job roles. Once you join a group, you'll be able to connect and network with peers across the industry, easily access professional development tools geared toward your CU role, find helpful links to common CUESNet questions, and more.

Log into [cues.org](https://cues.org) and click the CUESNet link under the networking tab. Once you're there, join a community and start connecting today!







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

In addition to Governance+ and other online director education tools, 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.

## CUES Symposium

**February 9–13**

**Kohala Coast, Big Island, HI**

Align the strategic vision of your top team through shared learning experiences. At this unique event, CEOs and board chairs must attend together, but will return home a stronger, more unified force. Learn more at [cues.org/SYMP](https://cues.org/SYMP).

**Member Team \$4,720 CAD Nonmember Team \$7,010 CAD**

Additional registrants are \$2,360 CAD for CUES Members and \$3,505 CAD for non-members.

## Execu/Summit®

**March 8–13**

**Park City, UT**

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. Learn more at [cues.org/ES](https://cues.org/ES).

**Members \$2,290 CAD Nonmember \$3,310 CAD**

## Execu/Blend™

**June 7–10**

**Santa Barbara, CA**

Explore strategic development and differentiation. Discover how to set a robust strategy, and the power of storytelling in innovative leadership. We'll also take a trip to a local winery to hear their story and learn how they differentiate themselves in a highly competitive market. Learn more at [cues.org/EB](https://cues.org/EB).

**Members \$2,095 CAD Nonmember \$3,115 CAD**

## CUES Governance Leadership Institute™

**June 7–10**

**Joseph L. Rotman School of Management  
University of Toronto**

Directors and executives, strengthen your boardroom contributions as you learn to balance healthy debate and diversity, as well as execute your fiduciary responsibilities. Learn more at [cues.org/GLI](https://cues.org/GLI).

**Members \$7,645 CAD Nonmember \$8,790 CAD**

## Board Chair Development Seminar

**July 13–14**

**Montreal, Quebec, Canada**

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. Learn more at [cues.org/BCDS](https://cues.org/BCDS).

**Members \$1,650 CAD Nonmember \$2,480 CAD**

## Director Development Seminar

**July 15–17**

**Montreal, Quebec, Canada**

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. Learn more at [cues.org/DDDS](https://cues.org/DDDS).

**Members \$1,840 CAD Nonmember \$2,670 CAD**

## Execu/Net™

**August 30–September 2**

**Jackson Hole, WY**

Executives and directors, broaden your perspective, challenge yourself and try new things as our speakers guide you through powerful morning sessions, covering growth strategies, financial complexity and innovation. Each afternoon network with peers and nature for a fresh perspective. Learn more at [cues.org/EN](https://cues.org/EN).

**Members \$2,095 CAD Nonmember \$3,115 CAD**

## Director Strategy Seminar

**September 23–25**

**Nashville, TN**

High-performing organizations cultivate strategy year-round to develop market-driven plans with solid underlying value propositions. Discover how to develop measurable strategic objectives as you learn about quality strategic thinking, strategic planning vs. tactical planning, challenges of succession planning, and more. Learn more at [cues.org/DSS](https://cues.org/DSS).

**Members \$1,840 CAD Nonmember \$2,670 CAD**

## Directors Conference

**December 6–9**

**Palm Desert, CA**

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. Learn more at [cues.org/DC](https://cues.org/DC).

**Members \$2,095 CAD Nonmember \$3,055 CAD**



## 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.



## Board Governance Assessment

Included with an Unlimited+ Membership!

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. Learn more at [cues.org/BGA](https://cues.org/BGA).

## 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 at [cues.org/CEOAssessment](https://cues.org/CEOAssessment).

## CUES Consulting

Leverage CUES Consulting to support your current practices and help you meet future goals. CUES Consulting strengthens your leadership pipeline by providing direction and focus to support your staff's growth. Identify and develop current and emerging leaders and high performers within your credit union. Learn more at [cues.org/CUESConsulting](https://cues.org/CUESConsulting).

## CUES eVote

Utilized by a number of Canadian credit unions with great success, this online voting tool streamlines merger and bylaw votes, board elections, and membership surveys—managing everything from ballots, to member service, to final result tabulations. Learn more at [cues.org/eVote](https://cues.org/eVote).

## 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. Learn more at [cues.org/DSA](https://cues.org/DSA).

## 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. Learn more at [cues.org/QG](https://cues.org/QG).

## ServiStar® Consulting

ServiStar will provide you with the tools to succeed in developing a member-centric team of employees that exceed member expectations and grow profitable relationships. Learn more at [cues.org/Servistar](https://cues.org/Servistar).

## Vertex Management Development Program

Make sure your new managers develop key skills to transition from being an individual contributor to team leader. This cost-effective program can help reduce turnover and enhance earnings through improved performance. Learn more at [cues.org/Vertex](https://cues.org/Vertex).

## Aprio

Aprio makes good governance simple, and helps organizations to efficiently run board meetings, keep directors up to date, and keep information secure. Learn more at [cues.org/Aprio](https://cues.org/Aprio).

## LEO Cyber Security

LEO Cyber Security is the premier provider of cybersecurity consulting to credit unions specializing in growing security programs through leadership, cyber operations, incident response, and compliance. They will help your organization build and manage reliable security programs through creative solutions. Learn more at [cues.org/LEO](https://cues.org/LEO).

## Think|Stack, Goma

Every digital transformation journey needs a well-thought-out strategic plan that includes the input of key decision-makers and influencers. Think|Stack's affordable cyber governance tool, Goma, can help you manage your digital transformation and easily communicate your progress to senior management, the board and auditors. Learn more at [cues.org/GOMA](https://cues.org/GOMA).

Learn more about all these offerings at [cues.org/Products](https://cues.org/Products).

## CUES Learning Portal

Included with CUES Membership, CUES Learning Portal, powered by Degreed, offers a great way to stay current with your professional development goals, in a self-paced online format. This powerful platform houses curated content and preset learning pathways on a variety of topics. You can also track items you've completed outside of the portal, including books, conferences, seminars, webinars, and university degrees. Plus, you can assign content to your direct reports. Learn more at [cues.org/CLP](https://cues.org/CLP).





University of Toronto

**Our mission:**

Educate and develop credit union CEOs, executives, directors and future leaders.

Leiha Fiddler  
VP/Sales & Member  
Relations—International  
604.559.4455

[leiha@cues.org](mailto:leiha@cues.org)  
[cues.org](http://cues.org)

Tanya Mueller Smith  
Manager Member Relations  
& Sales Support—Canada

[tanya@cues.org](mailto:tanya@cues.org)



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