



2021 CUES Talent Development Guide



Limitless.

That's your leadership potential.

As a CUES member, you are the heart of our mission. No matter what offering you choose, our distinct differences, including proven credit union talent development resources, partnerships with world-renowned business schools, prime networking opportunities and powerful industry insights, give you a strong foundation in realizing your potential and transforming you into tomorrow's exceptional leader.

You'll discover our offerings are about much more than just professional development; you'll make connections and build treasured relationships that can help propel your career forward.

Experience the CUES difference, and realize your greatest potential today.

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Membership

Advance Your Career With Flexible Learning

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 for more detailed information and to begin networking with over 27,000 of your peers.

Choose From

Individual Membership

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—all staff, executive team, and board members included. Both tiers feature enhanced benefits, and offer great ways to bring talent development to everyone at your credit union.

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	Yes	Yes	Yes
CUESNet™	Yes	Yes	Yes
<i>Credit Union Management</i> ™ Magazine	Yes	Yes	Yes
CUES Guide to Effective Mentorship	Yes	Yes	Yes
CUES Councils (special member pricing)	Yes	Yes	Yes
CUES Director Education Center	Yes	Yes	Yes
CUES Webinar Series	Yes	Yes	Yes
Discounted Event Pricing	Yes	Yes	Yes
Harvard Manage Mentor® NEW	Yes	Yes	Yes
CUES Elite Access™ Virtual Classroom	Yes	Yes	Yes
CUES Leadership Development Guide	Yes	Yes	Yes
Director Onboarding Tool Kit	Yes	Yes	Yes
CUES Executive Compensation Survey*	Yes	Yes	Yes
CUES Employee Salary Survey*	Yes	Yes	Yes
Governance+	Yes	Yes	Yes
Board Governance Assessment	Yes	Yes	Yes

*Surveys not applicable to Canadian credit unions.

Key Membership Benefits

New! Harvard ManageMentor®

This on-demand, online learning resource offers easy access to more than 40 courses from Harvard Business Review, covering topics such as Business Plan Development, Career Management, Difficult Interactions, Innovation Implementation, Strategic Thinking and much more.

Getting Harvard ManageMentor® on your own would cost \$650 per person, making this a tremendous value!



CUES Learning Portal, powered by Degreed

A blend of curated content and pre-set learning pathways offer an easy way to expand your skillset. Build connections and leverage relationships when you recommend or assign what you've learned to others. Managers—easily view the progress of your staff to aid in their development.

Credit Union Management™ Magazine

Stay on top of the latest CU news with print and digital subscriptions to CUES' monthly magazine. This publication is consistently top-rated within the industry, and offers articles covering general management, board, operations, marketing, and human resources. For even more real-time industry news visit **CUmanagement.com**.

CUES Director Education Center

Increase your competency on critical board topics with continually updated, interactive director education courses.

Elite Access™ Virtual Classroom

The closest thing to in-person learning, online! Participants can talk and interact with peers and experts, problem-solve, and build relationships, right from their desk. This is the perfect tool for staff with a limited professional development budget, and a great way to offer learning to up-and-coming employees.

CUESNet™

Easily access your membership benefits and collaborate with your peers when you connect with CUES' online community. This secure, members-only platform allows you to join communities relevant to your job role and engage with the industry by sharing content and insights with others.

MEMBERSHIP DUES

Individual CUES Membership

Credit Union Staff	\$895
Credit Union Directors	\$495

CUES Unlimited Membership

Assets \$0-\$249M	\$3,995 (\$7,142 value)
Assets \$250-\$499M	\$5,995 (\$11,671 value)
Assets \$500-\$1B	\$7,195 (\$14,055 value)
Assets \$1B	\$8,395 (\$21,275 value)

CUES Unlimited + Membership

Assets \$0-\$249M	\$5,295 (\$19,261 value)
Assets \$250-\$499M	\$7,295 (\$28,755 value)
Assets \$500-\$1B	\$8,495 (\$33,900 value)
Assets \$1B	\$9,695 (\$49,189 value)

Values are approximate and based on an average number of employees within each asset size.

Not a CUES Member? Join Today!

When you're planning and budgeting for 2021, 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
- Staff
- Managers

When you're ready to join, visit cues.org/Membership, or contact us at membership@cues.org, or by calling **608.271.2664, ext. 340**.

Awards and Recognition

Give your peers the recognition they deserve!

Acknowledge the industry's high achievers by submitting nominations for these honors. See details at cues.org/Awards.

- **CUES Outstanding Chief Executive**
Recognizes outstanding leaders at the CEO level.
- **CUES Exceptional Leader**
Honors non-chief executive officers.
- **CUES Distinguished Director**
Recognizes board members whose efforts have strengthened their credit union.
- **CUES Hall of Fame**
Celebrates credit union professionals for life-long dedication to the industry.
- **CUES Emerging Leader**
Distinguishes future industry leaders through online learning, peer collaboration and competition.

Trusted Industry Providers

CUES Supplier Members Can Solve Your Challenges

When you need outside expertise, connect with the best—CUES Supplier members. Look no further for trustworthy, ethical and experienced vendors dedicated to the credit union industry.

CUESolutions—Another Level of Expertise

CUESolutions providers showcase their thought leadership through access to their products, services, articles, videos, and whitepapers. Turn to these experts when you need not just a vendor, but a partner.



CUES members, start today by accessing the CUES Supplier Member Directory. Visit cues.org. You'll find the directory under the Networking tab.



CUES is partnering with Cornell University to bring eCornell—digital, Ivy League-level executive education—to the industry! Watch cues.org for more details.

COMING IN 2021:

- **Diversity, Equity, and Inclusion Certificate Program**
Classes Start February 17
cues.org/eCornell-DEI
- **Strategic Human Resources Leadership Cornell Certificate Program**
- **Strategy and Digital Marketing Cornell Certificate Program**
- **Credit Union Managers Certificate Program**





CEOs

Today's credit union CEOs face challenges on many fronts—competitive threats, board governance, succession planning—just to name a few.

CUES has the resources, tools, networking and development opportunities you, your board and executive team need to lead your credit union into the future.

EVENTS

Knowledge & Networking November

Explore vital industry topics with three of our top-rated speakers Thursday afternoons in November. One flat rate covers your entire staff, so everyone at your CU can learn together. Learn more at cues.org/KNN.

CUES Symposium

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.

CEO/Executive Team Network™

This dynamic conference, designed for CEOs and senior executives, focuses on growth opportunities. You'll examine strategy and leadership, participate in thought-provoking sessions on the latest industry trends, and enjoy unparalleled networking. Learn more at cues.org/CNET.

CEO Institute I: *Strategic Planning*

**The Wharton School
University of Pennsylvania**

Learn to turn challenges into change. Delve into strategic planning by embracing uncertainty, rather than ignoring it. Learn more at cues.org/INST1.

CEO Institute II: *Organizational Effectiveness*

**Samuel Curtis Johnson Graduate School of Management
Cornell University**

Effective change management skills are needed for even the most thought-out plan. Reach beyond your area of expertise and include every level of executive management in your credit union. Learn more at cues.org/INST2.

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

CEO Institute III represents the highest point in your professional leadership development. 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.

CUES Governance Leadership Institute™ Joseph L. Rotman School of Management University of Toronto

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.

Governance Leadership Institute™ II Joseph L. Rotman School of Management University of Toronto

Gain an in-depth understanding of how new technologies like artificial intelligence, block chain, and data analytics can optimize your operations and give your credit union a competitive edge. Learn more at cues.org/GLI2.

Strategic Innovation Institute™ Stanford Graduate School of Business Stanford University

Learn to embrace innovation and become a successful agent of change. Graduates of this robust program are well equipped with an understanding of innovation that benefits their credit unions immediately. Learn more at cues.org/SII.



Digital Learning

CUES offers easy access to a vast array of online learning options from on demand content and learning plans to online courses led by industry experts and university professors. For all of our digital learning opportunities, visit cues.org.

Strategic Growth Institute™ The University of Chicago Booth School of Business

Walk away knowing how to analyze, evaluate, and recommend specific actions to grow your credit union while avoiding common pitfalls. Learn more at cues.org/SGI.

SOLUTIONS

CEO Networking Group

As CEO your role comes with prestige and responsibility, but at times, also a sense of isolation. CUES CEO Networking Groups are meant to provide a sense of community and camaraderie through shared problem-solving and networking, with the goal of helping you conquer the challenges only other CEOs can understand. These exclusive, invitation-only groups are comprised of 6-8 CEOs from non-competing markets and are facilitated by esteemed business school faculty. Contact cues@cues.org for more information.

CUES Consulting

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.

Board Governance Assessment

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/BoardAssessment.

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.

Director Skills Assessment

Improve board recruitment and focus training resources by evaluating individual and collective capabilities to pinpoint skill set gaps in five key areas. Learn more at cues.org/DirectorAssessment.

Cornerstone Advisors

Through strategic solutions, mergers and acquisitions, lending solutions, and delivery channel solutions, Cornerstone helps credit unions reduce costs, increase revenue and stay competitive. Fill out an interest form today at cues.org/Cornerstone.



Executives

Your experience, expertise and leadership skills have gotten you to this point in your career. To remain successful, and to go even further, you'll need to stay sharp. CUES can help you improve in your current role—and if you really want it, prepare you for the CEO's chair.

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The University of Chicago
Booth School of Business

Walk away knowing how to analyze, evaluate, and recommend specific actions to grow your credit union while avoiding common pitfalls. Learn more at cues.org/SGL.

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CUES School of Applied Strategic Management™

Help your credit union—and your members—soar. 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.



SOLUTIONS

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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.

CUES eVote

Whether you are planning a board election, merger or bylaw vote, or a membership survey, CUES eVote is the smart, safe and affordable way to go. This easy-to-use and highly secure solution offers online, phone, and paper balloting. Voting services include hybrid elections, customization, a state-of-the-art platform, voting confirmation certificates, and more. Learn more at cues.org/eVote.

CUES Online University

CUES Online University offers compliance and front-line training—including fraud prevention—at a very low cost. Whether you want straight off-the-shelf training or something customized just for you, CUES Online University is key to saving time and money by providing convenient and consistent training to improve your credit union's performance. Learn more at cues.org/CUESU.

CUES Executive Compensation Survey

Keep tabs on compensation trends while engaging with valuable tools and data to help you attract and retain qualified professionals. Benchmark your organization against others based on asset size, region, membership size and more. Purchase now at cues.org/ECS.

CUES Employee Salary Survey

Use CUES data and tools to benchmark salaries for non-executive positions. Choose your peer group based on asset size, region, membership size, and more. Purchase now at cues.org/ESS.

Cornerstone Advisors

Through strategic solutions, mergers and acquisitions, lending solutions, and delivery channel solutions, Cornerstone helps credit unions reduce costs, increase revenue and stay competitive. Fill out an interest form today at cues.org/Cornerstone.

First Line of Defense™

This low-cost fraud prevention training tool offers online lessons based on real-life examples as reported by the FBI and Office of the Comptroller. Learn more at cues.org/FirstLine.



Experienced Leaders & Department Heads

You've demonstrated you're an asset to your credit union.
Now you're ready to take it to the next level. CUES can help.

EVENTS

CUES School of Applied Strategic Management™

Dates To Be Determined*

Location To Be Determined*

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.

CUES School of Business Lending™

All three CUES business lending schools are facilitated by the same experts who train the state and federal examiners. You'll learn to develop a successful business lending program that is right for your credit union. These may be taken individually or as a series for maximum benefit.

Attend all three schools in one year at a discounted rate.

CUES School of Business Lending™ I:

Business Lending Fundamentals

Online Event February 3 - March 4

Visit cues.org/SOBL for details.

CUES School of Business Lending™ II:

Financial Analysis and Diagnostic Assessment

Online event March 31 - April 29

Visit cues.org/SOBL2 for details.

CUES School of Business Lending™ III:

Strategic Business Lending

Online event June 2 - July 1

Visit cues.org/SOBL3 for details.

CUES School of Strategic Marketing™

Dates To Be Determined*

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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.

SOLUTIONS

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CUES Executive Compensation Survey

Keep tabs on compensation trends while engaging with valuable tools and data to help you attract and retain qualified professionals. Benchmark your organization against others based on asset size, region, membership size and more. Purchase now at cues.org/ECS.

CUES Employee Salary Survey

Use CUES data and tools to benchmark salaries for non-executive positions. Choose your peer group based on asset size, region, membership size, and more. Purchase now at cues.org/ESS.

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Digital Learning

CUES offers easy access to a vast array of online learning options from on demand content and learning plans to online courses led by industry experts and university professors. For all of our digital learning opportunities, visit cues.org.





New & Aspiring Managers

Making the jump from individual contributor to manager can be hard. You have the functional expertise, but may need help with the fundamentals of team leadership. We have the tools to help you succeed.

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First Line of Defense™

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CUES Emerge

This program for emerging leaders offers a valuable six-week online educational component, the opportunity to collaborate with peers, and coaching and assistance in creating a business case for your credit union. Free to participants. Learn more at cuesemerge.com.



New! Harvard ManageMentor®

This on-demand, online learning resource offers easy access to more than 40 courses from Harvard Business Publishing, covering topics such as Business Plan Development, Career Management, Difficult Interactions, Strategic Thinking and much more. Available to Unlimited and Unlimited+ members. Learn more at cues.org/HMM.

HARVARD
ManageMentor®



Credit Union Staff Including Front-Line Employees & Individual Contributors

Hone the skills needed for your current role, and improve your soft skills to move up the ranks. CUES offers live and virtual resources to help you lay the foundation for a brilliant career.

SOLUTIONS

CUES Online University

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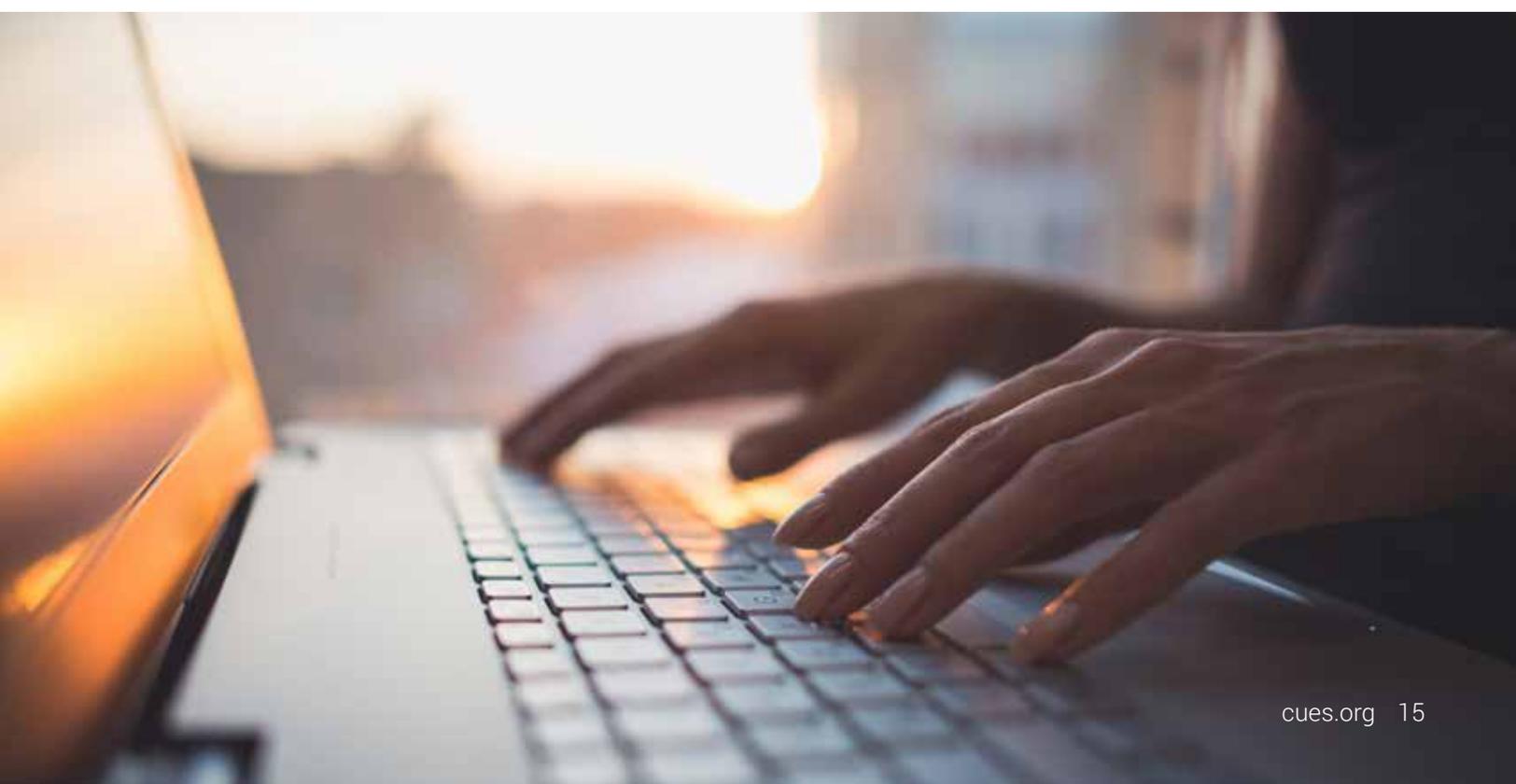
CUES Guide to Effective Mentorship

Build strong, effective mentor relationships, and find tips on ways to find a good match in a mentor with the practical tools found in this guide, included with CUES Membership. Login to download the guide at cues.org/MentorshipGuide.

CUES Councils

Attend at the special member price and learn directly from industry experts while connecting with peers at these in-person regional networking events. Learn more at cues.org/Councils.

Don't forget to check out CUES Webinars and Podcasts. Visit [CUES.org](https://cues.org) and CUmanagement.com.





HR, Training & Talent Development

You're in a unique situation. You need and want professional development for yourself, but you are also responsible for meeting the training and development needs of your entire credit union. Well...CUES can help with both.

Our learning platforms make it simple to implement an effective training program for everyone at your credit union, and there are plenty of resources to manage your own development too.

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CUES Consulting

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CUES Compensation Surveys

Easily keep up on industry hiring trends with CUES Executive Compensation Survey and CUES Employee Salary Survey. Each offers compensation information on a wide range of positions, relevant data for credit unions of all sizes, and customized results that can be sorted with up to nine criteria, including region, assets, and CU name. Purchase now at cues.org/ECS and cues.org/ESS.

CUES Elite Access™ Virtual Classroom

The closest thing to in-person learning, online! Participants can talk and interact with peers and experts, problem-solve, and build relationships, right from their desk. This is the perfect tool for staff with a limited professional development budget, and a great way to offer learning to up-and-coming employees. Included free with CUES Unlimited and Unlimited+ Memberships! Learn more at cues.org.

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.





Board Liaisons

You provide a vital role at your credit union, serving as the connection between the board of directors and senior management. CUES has the tools you need to increase your value and expand your network.

EVENTS

Board Liaison Workshop

This event will provide you with practical tools, including actionable guidance on ways to build better board meetings, develop more effective board packets and meeting agendas, enhance committee charters and board portals, and much more. Plus, you'll make valuable connections as you share best practices with your peers. Learn more at cues.org/BLW.

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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. Purchase now at cues.org/BoardAssessment.

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Supervisory/Audit Committee Assessment

Gather candid feedback on the effectiveness of this important committee. Learn more at cues.org/CommitteeAssessment.

Director Skills Assessment

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CUES eVote

This easy-to-use and highly secure voting solution offers online, phone, and paper balloting. Services include hybrid elections, customization, and a state-of-the-art platform. Learn more at cues.org/eVote.

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.

CUES Director Education Center

Offer your directors a convenient way to keep up on the latest in important governance topics with this suite of continually updated, online courses. Included as a benefit in all levels of CUES Membership. Learn more at cues.org/DEC.

Governance+

Offers premium, in-depth, education for all board members using digital learning. Available to Unlimited+ members. Learn more at cues.org/Governance-Plus.

Check out the CUESNet Board Liaison Community

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

We're pleased to offer a group within CUESNet dedicated to governance support professionals. Once you join the group, you'll be able to connect and network with other board liaisons. Plus, you'll find easy access to professional development tools specifically for you, a checklist of ideas on keeping your board engaged, helpful links to common CUESNet questions, and more.

Log into cues.org and select My CUESNet from the My Account drop down. Once you're there, join the Board Liaison Community and start connecting today!





Board Members

As a credit union director you play a key role in driving the strategic direction of your credit union. Join CUES and get the resources and training you need to fulfill your governance and fiduciary responsibilities.

EVENTS

Directors & Dialogue December

Explore vital industry topics tailored to credit union directors Wednesday afternoons in December. Learn more at cues.org/DDD.

CUES Governance Leadership Institute™

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Discover how to execute your fiduciary responsibilities and strengthen your contributions in the board room as you learn to balance healthy debate and diversity with consensus building. Learn more at cues.org/GLI.

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CUES Symposium

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.

Directors Conference

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.

Execu/Summit®

This meeting's unique schedule—bookending educational sessions around midday networking on the slopes—will leave you armed with the knowledge you need to take your organization's performance to the next level. Learn more at cues.org/ES.

Execu/Blend™

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.

Execu/Net™

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.

Director Development Seminar

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/DDS.

Director Strategy Seminar

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.

Board Chair Development Seminar

The chairperson's primary role is to maximize the value of the board while maintaining a delicate balance with effective governance. Attend to gain the unique, advanced skill set you need to lead a high-performing board. Learn more at cues.org/BCDS.

Supervisory Committee Development Seminar

Join us and discover what it takes to effectively work with management, the board, and internal and external auditors as a supervisory committee member. Learn about the different risks facing credit unions and be prepared to handle any changes that arise. Learn more at cues.org/SCDS.

SOLUTIONS

CUES Director Education Center

Increase your competency on critical board topics with continually updated, interactive director education courses included in all levels of CUES Membership. Learn more at cues.org/DEC.

CUES eVote

Whether you are planning a board election, merger or bylaw vote, or a membership survey, CUES eVote is the smart, safe and affordable way to go. This easy-to-use and highly secure solution offers online, phone, and paper balloting. Voting services include hybrid elections, customization, a state-of-the-art platform, and voting confirmation certificates, and more. Learn more at cues.org/eVote.

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.

Board Governance Assessment

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/BoardAssessment.

Director Skills Assessment

Improve board recruitment and focus training resources by evaluating director's individual and collective capabilities to pinpoint skill set gaps in five key areas. Learn more at cues.org/DirectorAssessment.

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.

Supervisory/Audit Committee Assessment

Gather candid feedback from the perspectives of your committee and board members, as well as your senior management team, on the effectiveness of your Supervisory/Audit Committee. Learn more at cues.org/CommitteeAssessment.

Governance+

Offers premium, in-depth, education for all board members using digital learning. Available to Unlimited+ members. Learn more at cues.org/Governance-Plus.





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

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