



High Performing Board Digital Series

July 2021 – April 2023

Program Objective:

Transform your board into a driving force for your credit union's success with [CUES High-Performing Board Digital Series](#). This comprehensive online seminar series supports credit union boards aspiring to enact best practices and achieve exceptional performance. Learn from professors hailing from top universities, including: Wharton School of Business, University of Pennsylvania; Booth School of Business, The University of Chicago; UNC Kenan-Flagler Business School, University of North Carolina at Chapel Hill; University of Bath School of Management (UK); Leonard Davis Institute of Health Economics, University of Pennsylvania; as well as other credit union and cross-industry experts.

Designed to support the development of your entire board, attendees will increase their knowledge base using a variety of methods, including: live online sessions, independent reading, audio and video recordings, interactive discussions, downloadable tools, and an online community to support the development of your action plan.

Registration:

This series optimizes the participation of your *entire* board. Registration includes access for: board chairs, board liaisons, CEOs, board committee members, non-voting board members, and associate board members.

Member: \$9,900 USD (\$12,485 CDN) for 2 years (price includes entire board)

Non-Member: please contact events@cues.org for pricing

Series and Seminar Structure:

Sessions are scheduled quarterly, occur over a three-week period, and require a total time commitment of five to six hours. During these three weeks, participants will attend [two, ninety-minute live Zoom sessions](#) and complete independent work designed to help participants reflect on the seminar's topic.

Here is the schedule for Dr. Mike Useem's July seminar. The remaining seven seminars will follow the same format.

Date	Component	Description
June 29	Welcome & Orientation	In a 45-minute Orientation meeting we'll review the structure of the speaker's seminar, and the platforms being used throughout the series: CUES Learning Portal and CUESNet.
July 6–13	Pre-Work	Follow the CUES Learning Portal pathway <i>High Performing Board Digital Series</i> to view and complete approximately 60 minutes of pre-work for this seminar.
July 13	Live Presentation	The speaker will deliver a 90-minute presentation on the seminar's topic. (playback available)
July 13–20	Read and Reflect	Visit the CUES Learning Portal pathway and CUESNet Community online discussion board to engage with readings, case studies, or podcast episodes in preparation for the live discussion.
July 20	Live Discussion	The speaker and academic director will facilitate a 90-minute discussion related to the seminar's topic. (playback available)
July 1–October 1	Additional Resources	Academic director and seminar speaker provide a curated list of additional resources to support your development.

Meeting Topics	Faculty	Description
<p><i>The Future of Board Composition</i></p> <p>Seminar: July 6–20</p> <p>Live Dates: July 13 and 20, 2021 2:30–4:00 p.m. CST</p>	<p>Dr. Nancy Herbert</p> <p>CEO and Founder of Boardroom Sage, LLC</p>	<p>Research shows economically productive boards have a diverse composite of member representatives. Discover a framework for enriching board composition and strengthening practices related to recruitment, onboarding, retention, and renewal.</p>
<p><i>Working as a Board and as a Team</i></p> <p>Seminar: October 5–19</p> <p>Live Dates: October 12 & 19, 2021 10:00–11:30 a.m. CST</p>	<p>Dr. Mario Moussa</p> <p>Professor at Executive Programs at Wharton School of Business; President, Moussa Consulting</p>	<p>All boards are teams, and like most teams, they may never reach their full potential if they fail to communicate, collaborate, and work as a team. Establish the elements necessary to turn a board into a high-performing team.</p>
<p><i>Ethical Decision-Making in the Boardroom</i></p> <p>Seminar: January 5–19</p> <p>Live Dates: January 12 & 19, 2022 2:30–4:00 p.m. CST</p>	<p>Dr. Margaret Heffernan</p> <p>Professor of Practice at the University of Bath School of Management (UK), Lead Faculty for the Forward Institute’s Responsible Leadership Programme</p>	<p>The decision-making processes is central to setting the right tone and values throughout an organization. Explore the key tenets of ethical decision-making in the boardroom and beyond.</p>
<p><i>The Board’s Role in Winning Strategy</i></p> <p>Seminar: Mar. 30–Apr. 13</p> <p>Live Dates: April 6 & 13, 2022, 2:30–4:00 p.m. CST</p>	<p>Dr. Stephen Morrissette</p> <p>Visiting Professor of Strategic Management, Booth School of Business, The University of Chicago</p>	<p>It’s a board’s fiduciary duty to ensure the credit union has a clear, strategic path to serve members, provide for sustainable growth, and enhance institutional strength. Investigate best practices in strategic planning to create winning results.</p>

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<p><i>The Role of Boards in Moving from Strategy to Execution</i></p> <p>Seminar: July 5–19</p> <p>Live Dates: July 12 & 19, 2022, 2:30–4:00 p.m. CST</p>	<p>Dr. Kathy Pearson</p> <p>Adjunct Senior Fellow, Leonard Davis Institute of Health Economics, University of Pennsylvania; President, Enterprise Learning Solutions</p>	<p>Research demonstrates many organizations fail to execute strategies successfully. Learn the key elements a board must pay attention to too provide the oversight needed to execute a plan.</p>
<p><i>Enterprise Risk Management</i></p> <p>Seminar: October 4–19</p> <p>Live Dates: October 11 & 18, 2022, 2:30–4:00 p.m. CST</p>	<p>Ancin Cooley</p> <p>Founder and Principal, Synergy Credit Union Consulting</p>	<p>Enterprise Risk Management requires directors possess a conceptual understanding of the risks that impact credit union earnings and capital. Discuss why ERM is the glue holding strategic thinking, optimism, and pragmatic thought together. You'll also reflect on your credit union's risk practices.</p>
<p><i>Organizational Health and Talent Development</i></p> <p>Seminar: January 5–19</p> <p>Live Dates: January 12 & 19, 2023 2:30–4:00 p.m. CST</p>	<p>Dr. Y. Sekou Bermiss</p> <p>Associate Professor, University of North Carolina at Chapel Hill, UNC Kenan Flagler Business School, Strategy and Entrepreneurship</p>	<p>High-performing boards not only engage in succession planning, but also nurture robust leadership development programs that include front-line supervisors. Examine best practices and emerging approaches to talent development.</p>
<p><i>Defining a High-Performing Board in Leadership & Governance</i></p> <p>Seminar: April 2023</p> <p>Live Dates: TBD</p>	<p>Dr. Mike Useem</p> <p>Professor of Management and Director of the Center for Leadership and Change Management at the Wharton School of the University of Pennsylvania</p>	<p>Directors at many organizations are developing a new road map for when to lead, when to partner, and when to stay out of the way. Identify practices to help ensure governing boards and executive teams are working in partnership to lead the enterprise.</p>