



## **CONNECTICUT CU EXECUTIVE EDUCATION PROGRAM**

### Certification Requirements

The Connecticut CU Executive Education Program is an opportunity to immerse in learning and reflection. You will examine your career goals, strengthen your core competencies, and take your leadership to the next level. This is a two-year certification that runs on an academic calendar, beginning in September, designed for rising executives seeking well-rounded credit union knowledge.

#### **What will you gain from the Connecticut CU Executive Education Program?**

1. Understanding of the Credit Union Cooperative System
2. Comprehensive Review of Credit Union Operations
3. Financial and Economic Perspective
4. Real World and On-the-job Application
5. Leadership Assessments and Tools for Measuring Growth
6. Interactive Networking and Mentoring with Connecticut and Industry Leaders
7. Industry Respected Certificate of Executive Education from the CULOC

#### **What is Unique about Connecticut CU Executive Education Program?**

This program will broaden the expertise of functional leaders to prepare them for senior management and CEO positions, while creating opportunities to enhance soft skills and build a professional network that will help at every stage in a career.

Participating executives commit to attending nine sessions and completing projects each program year. Sessions will be full days, including lunch, and will provide a combination of classroom and hands-on learning opportunities.

#### **Learning Outcomes**

- Examine the planning, organization, leadership and control functions of running a credit union as a C-suite executive.
- Incorporate business principles, including finance, risk management and technology with credit union operations.
- Create a macro approach to identifying problems, framing solutions, and adapting to change.
- Build strategic skills for effective decision making and planning.
- Expand your capacity to lead teams and projects.
- Develop a personal leadership plan to facilitate growth into the future.

Core Competencies of a Credit Union CEO/Executive:

- Leadership
- Strategic Thinking
- Business Acumen, Operations
- Decision Making, Problem Solving
- Advocacy
- Financial Management
- Human Resources and Communication
- Industry Awareness, Networking

**PROGRAM REQUIREMENTS**

<b>YEAR 1</b>		
<b>Competency</b>	<b>Requirements</b>	<b>Projects</b>
Leadership	Leadership 101	
	Communication / Presentation Skills	
	Leadership 102	360° Assessment
	Bus Ethics, Org Culture, Decision-Making	
	Capstone	CU Strategic Proposal
Strategy	Economics 101	
	Finance	
	Asset Liability Management	
	Strategic Advancement	
	Economics 102	
CU Operations	Credit Union Difference	CU Research Project
	Risk Management	
	Technology Project Management	Core Conversion Case Study

<b>YEAR 2</b>		
<b>Competency</b>	<b>Requirements</b>	<b>Projects</b>
Leadership	Leadership 201	
	Advocacy	
	Capstone	360° Assessment Final Leadership Presentation
Strategy	Governance	Mentorship
	Innovation	CU Strategic Proposal Part II
	Strategic Thinking	Bank Simulation
CU Operations	Human Resources	Personal Leadership Plan
	Investments and Income Generation	
	Compliance and Regulation	
	Lending	

## CALENDAR

DATE		COURSE	WORK PRODUCT
September		Kick Off: CU Difference/Structure Leadership 101	CU Research Project Assigned 360° Assessment Assigned
October		Communication / Presentation Skills; Strategic Advancement	
November		Finance Asset Liability Management	
December		Economics 101	
January		No Class	CU Research Project DUE
February		Leadership 102	CU Research Project Presentation 360° Assessment DUE
March		Org Culture and Decision-Making Business Ethics	
April		Economics 102	
May		Risk Management: Disaster Technology Project Management Wrap Up	Conversion Case Study (in class) Personal Leadership Plan Assigned
September		Big 5 Governance	
October		Leadership 201: How we lead people; team focus.	Personal Leadership Plan Due Mentorship Update
November		Compliance and Regulation Lending Investments & Income Generation	
December		Innovation	CU Strategic Proposal Assigned
January		No Class	
February		HR	360° Assessment Assigned
March		Advocacy	
April		ALM: Financial Modeling	Bank Simulation (in class)
May		Capstone	360° Assessment DUE Final Leadership Presentation

Final Leadership Presentation includes:

- Update on Personal Leadership Plan
- Comparison of 360° Assessments
- Update on Strategic Proposal
- Update on Mentorship
- Learning Outcomes
- Action Plan