



CROSSstate

Credit Union Foundation

**EXECUTIVE LEADERSHIP
PROGRAM**

To encourage and advance the capabilities of credit union leaders by providing access to outstanding professional development opportunities and through building relationships with other Fellows and leadership coaches.

The Foundation Credit Union Executive Leadership Program is now available through the CrossState Credit Union Foundation to members of the Emerging Leaders, a professional networking group at CrossState Credit Union Association.

The Executive Leadership Program was created for the future leaders of the credit union industry and provides more than \$15,000 of funding for each participant for a six-year curriculum of credit union leadership development. Each year, two active Emerging Leader members will be selected as Credit Union Fellows to participate in the program. This program is a significant commitment on the part of both the CrossState Credit Union Foundation and the participant. Careful consideration to this commitment should be given prior to applying for this program.

Program Description

The Credit Union Executive Leadership Program is an exceptional in-depth series of training opportunities designed for credit union employees who have an interest in and demonstrate the aptitude to assume greater roles and responsibilities.

The positive impact on an employee ignites a passion that keeps participants motivated as they develop the leader within. They will delve into real life case studies through interaction with peers, developing deep relationships that enhance and strengthen the credit union community. Private one-on-one mentoring/coaching sessions are key to the individual's success and, thus, the credit union's success.

This investment in developing credit union leaders directly improves quality, efficiency, and performance within teams, offices, and branches thus improving the credit union's bottom line. Improved accountability, stronger work ethic, better employee relations, greater retention, and better conflict management are the expected results of participating in this program. It is the direct application of leadership concepts that makes the Foundation's Executive Leadership Program a valuable professional development opportunity.

(The Foundation's Executive Leadership Program was modeled after a Center for Credit Union Leadership program.)

Nomination Process

Fellows will be selected based on information provided in their written application. A letter of recommendation from the applicant's CEO and a letter from the applicant detailing why they would like to participate in the program are required. Please refer to the Nomination Form. Please review the details of this program so you understand the commitment level of this program.

Please note: If a Fellow moves his/her employment to another credit union during the six-year training period, approval must be documented from their new employer. If the Fellow terminates employment with a credit union or active participation with the Emerging Leaders during the six-year period of enrollment, their participation in this program will also terminate.

Submission deadline is February 15 of each year. Contact Sue Ward-Diorio at (717) 839-2244 or by email at sward-diorio@crossstate.org.

Program Details

Leadership Mentors

Fellows will be matched with a different leadership mentor every one to two years of the program. Each mentor will be a resource to the Fellow during their journey through this training. By having multiple mentors, participants can garner the greatest breadth of experience and networking.

Trainings

The program is divided into three areas of training and covers a six-year time frame. In addition to what is contained in this application, please get the latest information and timelines from the websites below:

CrossState Leadership School: held every August in State College, PA

<https://www.crossstate.org/education-events/calendar-of-events/events/crossstate-leadership-school-save-the-date/>

The National Credit Union Foundation's Development Education (DE): held four times a year in Madison, Wisconsin.

<https://www.ncuf.coop/development-education/program/>

CUNA for CUNA Management School: held every July in Madison, Wisconsin.

<https://www.cuna.org>

If the applicant has already completed any of the trainings, this will not preclude them from being accepted into the program and the applicant will not be required to complete that portion of the program again.

Years One and Two: CrossState Leadership School (Basic and Advanced)

Fellows will participate in the CrossState Leadership School, a week-long training held each year in the summer in State College, Pennsylvania. The school is sponsored by the CrossState Credit Union Association, in cooperation with Penn State Corporate Learning. The faculty members have advanced academic degrees and years of experience facilitating leadership training for adults. The CrossState Leadership School offers an excellent opportunity to develop the important management skills so critical to success.

The first year Fellow will attend the Basic Management track, designed to build skills in the basic roles, responsibilities, and relationships needed for participants to become tomorrow's credit union leaders. Fellows will develop practical skills in core competency areas that are key to the successful supervision and leadership of others. This course of study is recommended for supervisors, frontline personnel, and other credit union professionals who have little formal training in effectively supervising the work of others.

The second year the Fellow will attend the Advanced Management track, designed for experienced leaders who want to keep their knowledge and skills up to – or a step ahead of – the demands of today's credit unions. It will provide opportunities for CEOs and managerial leaders to build on their existing skills, core competencies, and experience.

In addition to the core curriculum, a full day is dedicated to current credit union topics. This day is designed to show attendees how to apply the management theories learned to address challenges facing credit union leaders. Executives from credit unions from New Jersey and Pennsylvania are invited to share their personal insight on how to meet these challenges, and experienced credit union professionals will lead breakout sessions on a variety of selected topics.

YEAR THREE: [Development Educator](#)

The second phase of the Executive Leadership Program is participation in the National Foundation for Credit Union's week-long Development Education (DE) Program held in Madison, Wisconsin. It is offered four times a year. Graduates earn certification as Credit Union Development Educators (CUEs). They join a networking group of thousands of graduates from across America and other countries.

Linking our past with credit unions' present, the DE program brings renewed relevance to the philosophy of "People Helping People." This unique and transformative training provides critical lessons in cooperative principles, credit union philosophy, and international development issues while incorporating challenges credit unions face today.

Participants are involved in group exercises, field trips, encouraged to ask questions of visiting speakers, and are required to complete team projects proposing solutions for credit unions to help alleviate or eliminate challenging situations in any given area. Benefits of the program include:

Graduates acquire skills in credit union outreach initiatives, problem solving, technical assistance, team building, and public presentations.

CUEs realize that local issues are indeed global – and that credit unions grow stronger by working cooperatively.

CUEs return to their jobs with new understanding of how to promote cooperative principles and credit union values as distinct advantages in today's competitive financial services marketplace.

CUEs become passionate advocates of the credit union philosophy, which boosts employee motivation, creativity, and a deeper commitment to their credit union organization and the movement.

YEARS FOUR THROUGH SIX: [CUNA Management School](#)

The final component to the training is enrollment in the three-year CUNA Management School. In cooperation with the University of Wisconsin Graduate School of Business, this intensive management program helps you learn and implement principles that make you a more dynamic and effective manager and leader. A leadership role at a credit union requires both a strong technical background and well-tuned emotional intelligence. This school allows students to hone their leadership strengths while rounding out the areas where they need more practice. Graduates earn a certification as a Certified Credit Union Executive (CCUE).

Each July, the University of Wisconsin and the city of Madison become home to credit union

professionals who are investing in their careers and the credit union movement's longest-running high-level educational program. While in Madison, students will have the opportunity to learn from credit union experts as well as professors from the University of Wisconsin School of Business. Students will develop a breadth of skills including leadership techniques, financial operations, and executive responsibilities.

The CUNA Management School program builds dynamic leaders with a rigorous blend of university classes and experiential learning activities. Students attend classes for two-week terms over three consecutive summers; the first year is one week with pre-work. In addition to on-site sessions, students complete two substantial written projects during the three-year period. In preparation for their second year, students are required to complete a research project and background analysis of their credit union. The third-year project develops a strategic plan that charts the course for their credit union in the short- and long-term future.

An experiential learning event is scheduled for each class every year. The experiences will be challenging with a focus on team building, communication, combining competition and cooperation, forming strategic alliance and servant leadership. These experiences will show how a group can work together to learn trust, leadership, and teamwork. Further, students find themselves immersed in a nonjudgmental and supportive environment. Experienced facilitators guide all activities illuminating and anchoring how the experiential activity relates to the credit union's mission and goals.

CUNA Management School is recognized throughout the credit union movement as an honor and mark of accomplishment and has a well-earned reputation as an outstanding three-year executive education program that has prepared thousands of students.



Executive Leadership Program Nomination Form

Fellows will be selected based on information provided in their written application and the CEO Letter of Recommendation.

Credit Union _____

Nominee's Name _____ Title _____

Nominee's Office Phone _____

Nominee's Cell Phone _____

Nominee's Email _____

Mailing Address _____

City / State / Zip _____

Supervisor's Name _____ Title _____

Supervisor's Phone _____

Supervisor's Email _____

Has the Nominee already completed any portion of the Program? _____

Application submission includes:

- This nomination form.
- A letter of recommendation from your credit union CEO. This must include a commitment to allowing the applicant's active participation in the program for the full six years, including any work needed to complete the requirements of each training outside of the formal training session time.
- Your letter of interest, stating your reasons for wanting to participate, your understanding of your commitment to this program and your agreement to complete all portions of each training.
- A copy of your resume.

Submit the application and materials to Sue Ward-Diorio, Executive Director of the CrossState Foundation at sward-diorio@crossstate.org. Submission deadline is February 15. Questions, please contact Sue by email or at (717) 839-2244.

Please note: If a Fellow moves his/her employment to another credit union during the six-year training period, approval must be documented from their new employer. If the Fellow terminates employment with a credit union or active participation with the Emerging Leaders during the six-year period of enrollment, their participation in this program will also terminate.

Applicants are welcome to reapply if not previously accepted into the program.