

# 2023



# PROFESSIONAL DEVELOPMENT

Training, Education & Networking



**CORNERSTONE  
LEAGUE**

# Education & Networking Opportunities

Cornerstone values providing strategically focused conferences, workshops, and extended education in a variety of formats to meet the needs of you and your team's professional development. We remain committed to utilizing diverse and relevant presenters and facilitators that are considered subject matter experts in the industry to ensure you receive top-of-the-line education.

## BE STRATEGIC – PLAN YOUR NETWORKING IN ADVANCE.

1. Connect with peers prior to arrival.
2. Choose a location to meet onsite.
3. Reach out to speakers, exhibitors, and sponsors in advance to see if available for a brief visit onsite.
4. Expand your network sharing insights via social media.
5. Invite peers to connect over dinner.

## LEARNING METHODS

In-Person

Virtual

On-Demand

Blended

## EXPERIENCES & EVENTS TEAM



**Tamra Gaines, CMM, CUDE**  
Experiences & Events Vice President



**Janine McBee, CMM, CUDE**  
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**Brandon Walker, CUDE**  
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Education Manager



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Events Coordinator

For questions specific to professional development, please email [training@cornerstoneleague.coop](mailto:training@cornerstoneleague.coop).

Credit union professionals from across the country are invited to come together at these esteemed, interactive events. Find out how these conferences can help your credit union achieve success.



ELEVATE: Credit Union Leadership Summit is designed with current and aspiring leaders in mind. Whether you're leading yourself, leading others, a C-suite executive, or a board volunteer, you'll receive timely and relevant education to advance your leadership competencies now and into the future.

- Peer-to-peer engagement with leaders from across the country
- Learn from industry-leading experts with intimate knowledge of credit unions and the issues they face
- Discover the strategies and skills leaders need to forge a path forward
- With over 70 booths and exhibitors in the expo hall, discover new products and services that will help guide your credit union into the future

“

Being reminded of the passion behind the credit union movement and being surrounded by others that feel and understand their purpose and mission was one of the best parts of ELEVATE: Credit Union Leadership Summit.

- ELEVATE: Leadership Summit attendee

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CORNERSTONE ANNUAL MEETING & COUNCIL FORUM

In-Person

## IMPACT 2023

As Cornerstone League's premier event, IMPACT offers three days of learning and development featuring an all-access pass for seven distinct forums designed by Cornerstone Councils.

With three keynote presenters to discuss timely topics relevant to our industry, sessions are designed for your entire credit union. IMPACT 2023 provides numerous opportunities for peer-to-peer networking, and offers topics such as innovation in technology, employee engagement, and the latest advocacy efforts.

In the expo hall, attendees can connect with more than 70 vendors, offering cutting edge products and services that help position credit unions for current and future success.

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**I felt this was one of the most beneficial conferences I have been to. The energy was great along with the connections with other fellow credit union employees.**

**- IMPACT attendee**

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## Southwest Lending & Collections Conference

In-Person

As new regulatory requirements and artificial intelligence change the lending landscape, staying up to date on the current trends is critical. This three-day event provides quality education from experts in the industry, networking with peers who face similar challenges, and working together to find solutions for growth. It also offers a marketplace vendor hall offering opportunities for innovation and growth, as well as solutions for your credit union.



CORNERSTONE DEVELOPMENT

## Small Credit Union Forum

In-Person

The small credit union forum is a low-cost conference targeted at small credit unions featuring industry experts who will address current and unique challenges and opportunities small credit unions face. The conference provides opportunities to advance their education, meet some of their required training, learn best practices, and find solutions while engaging with their peers.



CORNERSTONE DEVELOPMENT

## Young Professionals Conference

In-Person

The best investment organizations can make is in their greatest assets-your employees. Strengthen your bench by sending your young professionals to a conference designed to develop the next generation of credit union leaders. Learn how to become a voice in the credit union movement, educate others about the value of their generation, and build a network of peers that help each other grow within the credit union and in the community.

*Specifically targeted to credit union professional ages 18-40.*





CORNERSTONE DEVELOPMENT

In-Person

## CEO Roundtables

The CEO Roundtables are quick and impactful one-day events allowing you to come together to discuss hot topics and strategies for what is happening in the industry. Stay informed on current issues and regulations while sharing ideas and solutions with other CEOs, providing valuable insights into your credit union. Bring your questions...take home answers.



CORNERSTONE DEVELOPMENT

In-Person

## Managers Roundtable

The Managers Roundtable is a two-day event featuring golf as a networking opportunity prior to the event opening. Featured speakers along with the opportunity for credit union leaders to submit their list of important discussion topics ahead of time make this unique conference one you won't want to miss. Together we provide answers to your most pressing questions about the future of the credit union industry, such as regulatory and compliance updates, fraud liability, changes ahead, avenues for loans, multichannel, and mobile marketing, the latest technology, new products, and more.





CORNERSTONE DEVELOPMENT

In-Person

## Asset / Liability Management Workshops

Through Cornerstone's ALM essentials and implementation workshops, you'll learn the fundamentals of ALM pricing and expense control assessment; 13 key ratios addressing capital adequacy, asset quality, and earnings stability; interest-rate risk and its effect on future earnings; how to measure and monitor liquidity; and more.



CORNERSTONE DEVELOPMENT

Blended

## Bankruptcy & Collections Seminars

**Bankruptcy:** Focus on current and emerging problems for the credit union in the bankruptcy courts, bankruptcy essentials for the new credit union, and problems such as automatic stay issues involving post-petition repossessions, payroll deductions, credit reporting, and other unintentional violations.

**Collections:** Learn about compliance issues in the collection department, collection policies and procedures, guidelines for effective telephone collections, a section-by-section analysis of the Debt Collection Practices Act, and practical advice on telephone techniques and strategies that will make collectors more effective.



# Seminars & Workshops (cont.)



CORNERSTONE DEVELOPMENT

## Branch Manager Bootcamp

Virtual

This enhanced four-part series will focus on the next generation of branch leaders. The courses are designed to address the critical skills and expectations that need to be developed to ensure that the next-generation branch manager will exceed expectations and goals set for the branch and credit union.

Participants will engage in discussions and small group activities with credit unions across the region to share ideas and walk away with strategies to positively impact your front lines.



CORNERSTONE DEVELOPMENT

## Small Credit Union Workshops

Virtual

The local workshops are designed to bring relevant education and training to meet the needs of small credit unions. Compliance updates and hot topics are among the featured topics. The workshops are a great opportunity to network with your peers, share best practices, and learn about tools and resources available for small credit unions.

*The conference and workshops are specifically targeted to all CEOs/presidents, management, staff, directors, and volunteers of credit unions under \$50 million in assets.*



## SAVE TIME AND MONEY WITH EDUCATION DELIVERED TO YOUR DESKTOP

Offering more than 100 cost-effective, quality education options right to your desktop, webinars allow you to train as much as you want without leaving your office. Training is offered year-round on credit union-specific topics such as Auditing & Accounting, Collections, Compliance, Directors, Frontline & New Accounts, Human Resources, IT, IRA, Lending, Operations, Security & Fraud, and Senior Management.



The BSA Training Webinar covers all basic BSA & OFAC information. An interactive Q&A session will be available at the end of the webinar. Cornerstone issues a certificate of attendance listing those from your credit union who attend the training session to retain in your files for documentation.

**Visit [cornerstoneleague.coop/development](https://cornerstoneleague.coop/development) for developing details, event dates and locations.**

Change is in the air. To provide your employees with timely education, Cornerstone adds new opportunities throughout the year. Make sure you subscribe to the Development Digest and visit the Cornerstone website often for the most up-to-date information.

### **We want to hear from you!**

Let the experiences and events team know if there are specific topics you'd like to see covered in upcoming opportunities.

**[training@cornerstoneleague.coop](mailto:training@cornerstoneleague.coop)**



Designed exclusively for the credit union industry, the Credit Union Network webinars provide valuable education on industry trends and timely information on regulatory requirements. You can choose to register for a specific webinar or an entire series. If you can't attend a live webinar, archived webinars are available six business days after the live session and will expire six months after the live program date. There is also an opportunity to save money with bundle pricing, allowing you to provide training for your staff at an affordable rate.

Cornerstone helps save credit union leaders time and money through its webinar offerings in partnership with Financial Education & Development, Inc.

### **Council Webinars** On-Demand

The council webinars connect Cornerstone members and volunteers with industry-specific topics and issues related to their areas of expertise. Council members share their best practices, learn about the latest industry issues, and prepare for tomorrow's opportunities.



The robust curriculum is based on 12 core areas of leadership, which fit into the four leadership pathways found within credit unions: leading self, leading people, leading business, and volunteer board.

cuLEAD360 subscribers will have year-long exclusive access to a leadership competency assessment, as well as on demand training to propel their career advancement. This online learning program teaches valuable leadership skills rooted in the credit union movement's philosophy of "people helping people."

**For more information visit [www.culead360.com](http://www.culead360.com)**



The Cornerstone Leadership Academy was designed by credit union professionals for credit union professionals to impart knowledge in a collaborative atmosphere, promote mentoring and leadership, and serve as a springboard for students to become next-level credit union leaders. With a clear focus on building leaders, the academy encourages growth with engaging sessions, assignments, and discussion over nine months, which culminates in a team project presentation at graduation. This program is ideal for participants looking to grow and for current leaders to further demonstrate their expanded knowledge.



Executive-level development is paramount for the future success of the credit union industry. Demands on senior leaders have never been greater. In times of uncertainty and complexity, leaders must act decisively, think strategically, and possess a higher level of agility to continue into the future.

Expect for your greatest potential to be tapped during the six-month Signature Series program, giving you the knowledge, skills, and instincts needed to take action. The presenters are considered masters within their areas of expertise. With this elevated training, executive-level staff will be better prepared for the challenges and opportunities ahead.

The Signature Series experience includes two in-person events, high-impact education, small group discussions, and a capstone project. The value to you and your credit union is endless.



## Southwest CUNA Management School

Blended

### Expanding Horizons. Exploring Possibilities.

Southwest CUNA Management School is a three-year professional community designed to further executive skills and position credit unions forward. Curriculum focuses on advocacy, adaptive leadership, collaboration, finance and economics, and stakeholder experience. Faculty, peers, and mentors provide direction as each student builds a toolkit to take the credit union forward. This elite network provides value to alumni, their credit unions, and the credit union movement, well beyond graduation.

**SCMS scholarships are available through the Cornerstone Foundation.**

**For more information visit [www.scms.coop](http://www.scms.coop)**



CORNERSTONE LEAGUE

In-Person

## The Councils

Increase your education and collaboration through the Cornerstone League Council Program, offering member credit union professionals unique networking and relationship-building opportunities.

- Accounting & Finance
- Compliance & Audit
- HR
- Lending & Collections
- Marketing & Business Development
- Member Business Services
- Payments & Operations
- Technology
- Volunteers

Councils connect credit union professionals and volunteers with specific industry topics and issues related to their areas of expertise. In turn, council members share their best practices, learn about the latest industry issues, and prepare for tomorrow's opportunities.

A number of conferences include exclusive discounts for council members.

### Seeking to join a council or need to renew a previous subscription?

Go to [cornerstoneleague.coop/engagement/councils](https://cornerstoneleague.coop/engagement/councils) for more information. Select "view councils" My Councils and follow the online instructions.



## Professional Development Grants Offered through the Cornerstone Foundation

The Cornerstone Foundation is the 501(c)(3) charity of the Cornerstone League. The Cornerstone Foundation prides itself on its three key initiatives: promoting financial capability programs for youth and adults, providing access to professional development for credit union staff and volunteers, and offering financial relief for credit union staff when disaster strikes.

Credit unions in the Cornerstone region may apply for an Annual Training Calendar Grant to attend professional development training and education workshops and conferences offered by or through the Cornerstone Credit Union League or industry related organizations. To view guidelines, grant cycles, and applications, please visit the Cornerstone Foundation's website; [www.cornerstonefoundation.coop](http://www.cornerstonefoundation.coop).

## CU FinHealth™ Conference In-Person

CU FinHealth™ examines how credit unions are measuring and improving their member's health and well-being, and documenting the results. The conference also explores the connections between financial well-being, physical health, technology, and advocacy.

## FICEP (Financial Counseling Certification Program) Virtual

FICEP is an enhanced and unique training program for credit union staff looking to assist and empower members to improve their financial well-being. Upon completion, graduates become Certified Credit Union Financial Counselors (CCUFC). This program combines the convenience of a self-study program with group hands-on learning.

## CORNERSTONE FOUNDATION In-Person Principles & Philosophy Workshop

Understand the principles and philosophies guiding credit unions, and how their successful application will help define the future of the credit union movement. Learn how your credit union can put these concepts to work in everyday operations, ultimately meeting the needs of your members.

*The Cornerstone Foundation needs the support of the credit union community in order to make a difference. That's why we provide opportunities throughout the year to raise money and proudly promote the credit union philosophy of people helping people.*



In-Person

Watch your credit union peers in an epic lip sync battle sure to impress you, all while benefiting the Cornerstone Foundation. Expertly crafted, this must-see event is featured at ELEVATE: Credit Union Leadership Summit each year. Don't miss your chance to sing along for a great cause.



**CU SWING!** In-Person

The annual golf tournament supports the Cornerstone Foundation's three initiatives of financial capability programs, credit union development, and disaster relief for credit union employees and volunteers. All proceeds from the event go to the Cornerstone Foundation, which support credit union professionals through various initiatives and resources. The golf tournament will take place at IMPACT: Annual Meeting & Council Forum.



Lawmakers have the power to change the credit union landscape with the stroke of a pen. Cornerstone is your advocate in the legislative and regulatory world, manning the front lines in the state capitals and Washington - in the hearings, offices, and hallways - safeguarding the interests of credit unions and ensuring that financial cooperatives continue to flourish. By developing long-term legislative strategies, maintaining vigilance with regulatory agencies, keeping Cornerstone members informed of developments, magnifying the voice of credit unions everywhere, Cornerstone works to preserve an environment in which credit unions not only exist, but thrive.

## CUNA GAC

Blended

CUNA's annual Governmental Affairs Conference serves as the leading event for political impact in the credit union industry. This high-impact event provides esteemed keynote and breakout sessions covering the biggest issues facing credit unions, and networking and advocacy opportunities. Don't miss your chance to discover ideas and solutions to grow your credit union at CUNA GAC.



CORNERSTONE ADVOCACY

In-Person

## Texas GAC

Texas GAC is an opportunity for Texas area credit union leaders to interact with state lawmakers biennially to discuss legislative and regulatory/compliance issues related to how Texas credit unions operate. Credit union advocates have the opportunity to engage in valuable facetime with Texas state lawmakers and advocate for issues most important to them.

## ROAR - Grassroots Programs

Blended

ROAR is Cornerstone Advocacy's initiative for grassroots and PAC support that stands for Ready, Organize, Activate, and Respond.

ROAR unites staff and leaders in a robust show of support for credit unions and helps the movement gain political ground at state and federal levels.

How does my credit union sign up for ROAR? Visit [cornerstoneleague.coop/advocacy/grassroots](https://cornerstoneleague.coop/advocacy/grassroots) for more information.



CORNERSTONE ADVOCACY  
**Oklahoma GAC**

In-Person

The annual Oklahoma GAC is the premier advocacy event in the state and presents an excellent opportunity for credit union advocates to hone their skills, meet with elected officials, and network with colleagues. Conference speakers will discuss the legislative climate and pertinent bills in the House and Senate. Attendees have the opportunity to explore regulatory and legislative issues and explore ways to forge relationships with lawmakers.



CORNERSTONE ADVOCACY  
**Hike the Hill**

In-Person

Hike the Hill is a grassroots program sponsored by CUNA and the regional leagues to provide credit unions with the opportunity to visit Washington, D.C., to educate decision makers on credit union issues. When credit unions participate in Hike the Hill, they bring to life through real stories of how credit unions positively affect the lives of working Americans. Join credit union professionals and come together to visit with key regulatory agencies and members of Congress to discuss issues at the heart of the industry.

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**When legislation is written quickly, oftentimes it is written poorly. It is our job to analyze that information and ensure not only that our members' voices are heard, but that their priorities are honored, as well.**

**- Jim Phelps**  
EVP, Chief Advocay Officer  
Cornerstone League

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**SCAN WITH YOUR SMARTPHONE TO LEARN MORE.**

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[training@cornerstoneleague.coop](mailto:training@cornerstoneleague.coop)