

2022



PROFESSIONAL DEVELOPMENT

Training, Education & Networking



**CORNERSTONE
LEAGUE**



Education & Networking Opportunities

From strategically focused conferences, to workshops, and extended education, we strive to meet the needs of professional development for all levels of credit union employees. We utilize the best presenters and facilitators in the industry to provide you with top-of-the-line continued education.

BE A LEADER - PLAN YOUR NETWORKING IN ADVANCE

Make a plan to network in advance of each event, as well as onsite before, and after each session.

1. Connect with peers prior to arrival.
2. Plan ahead for the perfect meeting spot.
3. Reach out to speakers, exhibitors, and sponsors in advance to see if they are available for a brief visit onsite.
4. Expand your network sharing insights via social media.
5. Don't eat alone!

EXPERIENCES & EVENTS TEAM



Tamra Gaines, CMM, CUDE
Experiences & Events Vice President



Janine McBee, CMM, CUDE
SCMS Director



Amber Bailey, CUDE
Education Manager



Brandon Walker, CUDE
Events & Exhibits Manager



Meghan Jamison, CUDE
Programs Specialist

National Conferences

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

ELEVATE: Credit Union Leadership Summit gives you and your team variety with four custom-designed leadership training pathways. Whether you're leading yourself, leading others, a C-suite executive, or a board volunteer, you'll receive the outstanding training and knowledge you need to thrive where you are right now in your career—and where you're headed. Find high-quality sessions, networking opportunities, and more at the summit.

- Peer-to-peer engagement with leaders from across the country
- Learn alongside fellow industry experts and develop innovative skills to help your credit union thrive
- Discover innovation in leadership techniques
- Visit more than 70 booths and exhibitors in the Expo Hall to discover innovative products and services



Inclusion: Change Makers

How would you grade your DEI efforts? Diversity in the workplace brings challenges, but an inclusive workplace that embraces and channels different perspectives offers innovation, new ideas, and solutions leading to growth and prosperity for the entire organization.

This conference is for all credit union professionals who want to gain better insight into embracing and respecting diversity to foster an inclusive work place. Attendees will examine various DEI issues and offer new perspectives and solutions for making the workplace a safe and inclusive environment for everyone.

CORNERSTONE ANNUAL MEETING & COUNCIL FORUM

IMPACT 2022

IMPACT: Cornerstone Annual Meeting & Council Forum

Credit union employees and volunteers from all levels and experiences are encouraged to attend the IMPACT: Annual Meeting & Council Forum. Invest in your education with this three-day event featuring an all access pass for seven distinct forums designed by Cornerstone Councils, keynote presenters on topics relevant to our industry, and numerous opportunities for peer-to-peer networking. In the Expo Hall, attendees will find more than 70 vendors, offering relevant products and services that help position credit unions for current and future success.



Southwest Lending & Collections Conference

Southwest Lending & Collections Conference

This annual event is a great way for your credit union to ensure credit union staff is on the leading edge of industry trends, hot topics, and regulatory issues. Learn from experts in the field who will assist in developing new ideas and strategies to maximize loan growth and enhance collection efforts.



CORNERSTONE DEVELOPMENT

Young Professionals Conference

Young Professionals Conference

Young Professionals Conference allows credit union young professionals to connect, learn how to use their voice in the credit union movement, educate others about the value of their generation, and grow their role within the industry.

This event is specifically targeted to credit union professionals age 40 and under.

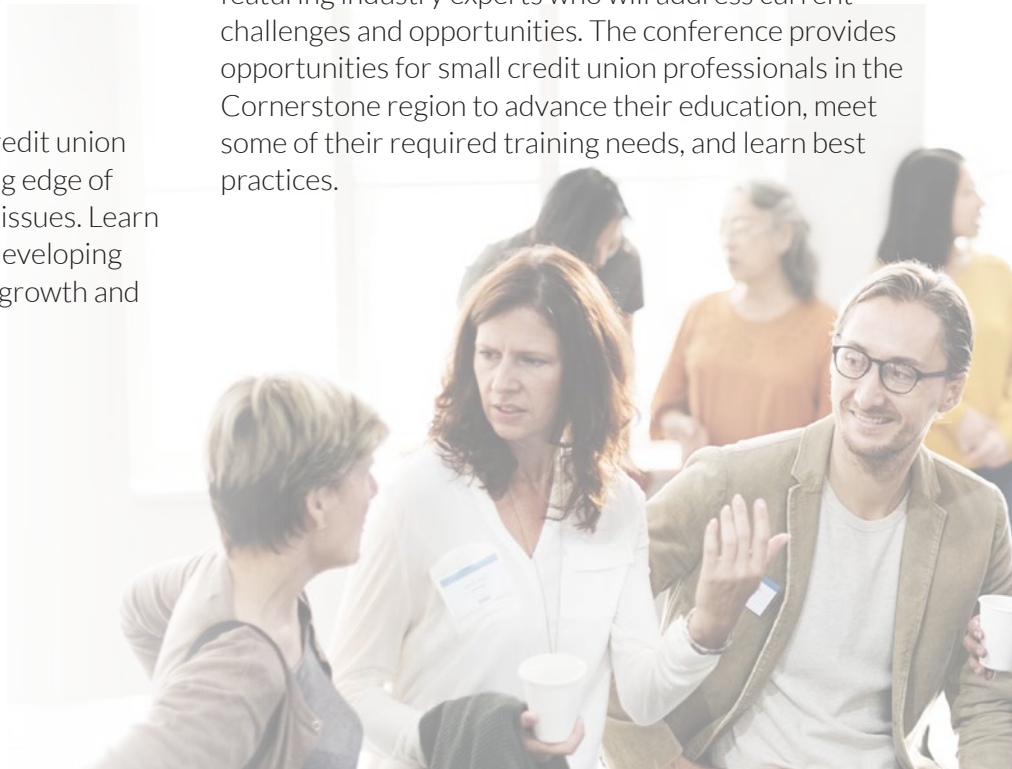


CORNERSTONE DEVELOPMENT

Small Credit Union Forum

Small Credit Union Forum

The Small Credit Union Forum is a special, low-cost conference targeted to small credit unions featuring industry experts who will address current challenges and opportunities. The conference provides opportunities for small credit union professionals in the Cornerstone region to advance their education, meet some of their required training needs, and learn best practices.



Roundtables



CEO Roundtables

CEO Roundtables are high-level events where chief executives can network and engage in discussions with their colleagues from around the region. CEO Roundtables are complimentary to affiliated credit unions, but what you'll receive in return is invaluable. Plan to attend and take advantage of the great opportunities you'll find there.



CORNERSTONE DEVELOPMENT

Managers Roundtable

Managers Roundtable

The Managers Roundtable is a two-day event featuring a golf networking opportunity prior to the event opening. This event is truly unique by inviting credit union management to submit their list of important discussion topics ahead of time and integrating them into high-quality conversations throughout the conference.

Through discussions with fellow credit union professionals, attendees find answers to pressing questions about the future of the credit union industry, such as regulatory compliance, fraud liability, changes ahead, avenues for loans, multichannel and mobile marketing, the latest payment technology, new products, and much more.





ALM Essentials Workshops

ALM Essentials Workshops are designed to build a solid foundation of the basic concepts of asset/liability management. The workshop focuses on the goals of ALM, which includes the key operational areas of earnings, capital, liquidity, and entry-level interest-rate risk. Attendees will review the key ratio analysis report that the Cornerstone League provides its members, illustrating how to monitor the regulatory communications provided by NCUA and review the components of the risk-focused exam.

ALM Implementation Workshops

Learn about interest-rate risk and its effect on future earnings. Use an ALM checklist to implement or update procedure in your credit union's ALM process to make it more effective. Develop ALM and investment policies to accurately reflect your credit union's risk profile. Attendees will learn how to measure and monitor liquidity, develop a consistent ALCO agenda, and perform due diligence on brokers and brokerage firms.



Bankruptcy and Collections Seminars

In these fast-paced virtual presentations, credit union attorneys will walk you through best practices, new legal requirements, and provide guidance that pertains to bankruptcy, collections, collections litigation, foreclosures, and evictions. Learn about the legal tools and tactics needed to achieve your credit union's financial goals. These training seminars are a must for bankruptcy and collections professionals, plus any other staff involved in the recovery process at your credit union.



Seminars & Workshops (cont.)



Branch Manager WORKSHOP

Branch Manager Workshop

This high-quality, four-day series will focus on the next generation of managers who will lead the transition to client relationship management, and managing an active advisory environment for the credit union to achieve financial goals. The next generation manager will be leading this vital transformation.

The workshop will focus on the critical skills and expectations that need to be developed to ensure that the next generation branch manager will exceed expectations. Participants will engage in discussions and small group activities to ensure that ideas are shared, and learning is entertaining and adopted.



CORNERSTONE DEVELOPMENT

Small Credit Union Workshops

Small Credit Union Workshops

The local workshops are designed to bring relevant education and training to meet the needs of small credit unions. Attendees will receive targeted education and training, regulatory and compliance assistance, hot topic notifications, and operational guidance. The workshops are a great opportunity to network with peers, share best practices, and learn what tools and resources are available for small credit unions to address their unique challenges and opportunities.

The conference and workshops are specifically targeted to all CEOs/presidents, management, staff, directors, and volunteers of credit unions under \$100M 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 ever leaving your office. Training is offered year-round on such credit union-specific topics as auditing and accounting, collections, compliance, directors, frontline and new accounts, human resources, IT, IRA, lending, operations, security and fraud, and senior management.



BSA /OFAC Training Webinar

This webinar aims to cover all the basic information pertaining to BSA & OFAC. Attendees will be invited to join a question-and-answer session to discuss relevant topics. Cornerstone League will issue a certificate of attendance listing those from your credit union who attend the teleconference training session to retain in your files for documentation.



CU Network Webinars

Webinars are provided on numerous topics that are relevant to credit unions today. You can choose to register for a specific webinar or an entire series of webinars with related subject matter. If you can't attend a live webinar, archived webinars are available beginning six business days after the webinar and will expire six months after the live program date.

Cornerstone is pleased to offer access to the Credit Union Webinar Network in partnership with Financial Education & Development, Inc.

Visit cornerstoneleague.coop/development for developing details, event dates and locations.

In addition to the previously listed seminars, workshops and webinars, be on the lookout for new opportunities throughout the year.

Let the Experiences & Events team know if there are specific topics you'd like to see covered in your area:
training@cornerstoneleague.coop.

Extended Education



**Southwest CUNA
Management School**

Southwest CUNA Management School

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.

For more information visit www.scms.coop



cuLEAD360

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 based on the credit union movement's philosophy of people helping people.

For more information visit www.culead360.com



Executive Signature Series

Executive level training is paramount for credit union leadership. This extended education focuses on addressing a higher level of expertise. The presenters are considered "masters" within their subject and with this elevated training, executive level staff will be better prepared for the challenges and opportunities ahead.

The Signature Series will be a three-part experience extended over nine months, comprised of education for executive level leaders. The three parts will focus on:

- **Strategic Thinking**
- **Digital Technology**
- **Inclusive Culture**

In addition to the webinars, there will be peer networking, a special No Nonsense Experience and an in-person strategy session at ELEVATE: Credit Union Leadership Conference.



Cornerstone Leadership Academy

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 through engagement in a convenient nine-month program delivered by your chapter. This program is ideal for participants looking to grow and for current leaders to further demonstrate their expanded knowledge.

Chapter and Councils



Chapters Program

The Chapters Program is a forum for organizing and connecting credit union leaders and providing opportunities to network, share ideas and best practices, advance leadership skills through training and education, develop strong community relationships, and execute grassroots government relations programs that connect credit unions with lawmakers. Cornerstone's Chapters Program comprises 33 chapters in Arkansas, Oklahoma, and Texas.

For more information, contact
chapterrelations@cornerstoneleague.coop.



CORNERSTONE LEAGUE

The Councils

Councils

Our goal of increasing education and collaboration among credit unions is enhanced with the Cornerstone League Council Program, offering professionals of our member credit unions unique opportunities for networking and relationship building through regional council activities and unique council benefits. Councils provide fingertip access, connecting credit union professionals and volunteers with specific industry topics and issues related to their areas of expertise.

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

Seeking to join a council or need to renew a previous subscription? Go to cornerstoneleague.coop/engagement/councils for more information. Select "My Councils" and follow the online instructions. Council subscriptions for all Cornerstone councils are \$25 per year.



Professional Development Grants Offered through the Cornerstone Foundation

The Cornerstone Foundation is the 501(c)(3) charity of 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 League or industry-related organizations. To view guidelines, grant cycles, and applications, please visit the Foundation's website, www.cornerstonefoundation.coop.

CU FinHealth™ Conference

CU FinHealth™ examines how credit unions are measuring their members' financial health and well-being, working to improve it and documenting the results. The conference explores the connections between financial well-being, physical health, technology, and advocacy.

FICEP (Financial Counseling Certification Program)

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.

Principles & Philosophy Conference

Learn how your credit union can put foundational concepts to work in everyday operations at Cornerstone's Principles & Philosophy Conference. Attendees will explore the principles and philosophies that guide credit unions and discover how their successful application will help define the future of the credit union movement.

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.


SYNG

The annual lip-synching contest is held at the ELEVATE: Credit Union Leadership Summit. All proceeds from the event support the Cornerstone Foundation's mission: Empowering credit unions to make a difference in their communities. The informational, interactive event allows attendees to learn more about the Cornerstone Foundation's overall initiatives and resources available to member credit unions.

Golf Tournament

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.

Advocacy



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 League 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

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. CUNA GAC is a chance to discover ideas and solutions for leaders to grow their credit unions.

Oklahoma GAC

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, as well as tips for forging relationships with lawmakers.

Hike the Hill

Hike the Hill is a grassroots program sponsored by CUNA and the state leagues to provide credit unions with the opportunity to visit Washington 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.

ROAR - Grassroots Programs

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 <https://www.cornerstoneleague.coop/advocacy/grassroots> for more information.



2022 EVENTS CALENDAR

Take advantage of Cornerstone League's valuable learning opportunities, presented by some of the industry's most sought-after trainers and speakers. From strategically focused conferences and seminars to intensive workshops and hot-topic webinars, your Cornerstone membership gives you access to a wide variety of educational options.

Below are a few signature events to help you budget for professional development. Watch your email and for the development newsletter for more information and added events.

			Member Early Bird Rates*
APRIL	20-22	IMPACT 2022: Annual Meeting & Council Forum	\$550
	22-23	Small Credit Union Forum**	\$175
MAY	TBD	YP Conference	\$550
	10-12	Southwest CUNA Management School (SCMS) Virtual	Incl.
JULY	10-15	Southwest CUNA Management School (SCMS)	\$3,599
AUGUST	31- Sept. 2	ELEVATE: Credit Union Leadership Summit	\$875
SEPTEMBER	21-23	Managers Roundtable	\$425
OCTOBER	18-20	Southwest CUNA Management School (SCMS) Virtual	Incl.
	TBD	Principles & Philosophy Conference*	\$750
	TBD	Southwest Lending & Collections Conference	\$700
NOVEMBER	14-15	INCLUSION: Change Makers	\$425

Visit cornerstoneleague.coop/development for details, event dates, and locations and cornerstoneleague.coop/development/cu-webinar-network for all the latest webinars available to you.

Members are encouraged to sign up for Cornerstone's on-demand learning tool—**cuLEAD360**—to help develop credit union leaders' career and leadership skills. Powered by the Cornerstone League, this affordable, subscription-based tool is based on the 12 leadership core competencies every leader needs to be successful in their role. For more information, go to cuLEAD360.com.

*Cornerstone Foundation event

**Small Credit Union Support



PROFESSIONAL DEVELOPMENT

Training, Education & Networking



SCAN WITH YOUR SMARTPHONE TO LEARN MORE.

For questions specific to professional development, please email:
training@cornerstoneleague.coop