



Leadership for Contemporary Financial Cooperatives

Preparing Your Senior Managers to be Strategic Leaders

An Invitation to Credit Union CEOs

The ProCon Group, LLC invites you to build greater leadership depth in your senior team by reserving a place for one of your executives at the ProCon Leadership Institute™. The next series of three, four-day sessions begins on January 16, 2011 in Santa Cruz, CA. The three-part course will conclude in December 2011.

Presented by an outstanding faculty, the Institute is designed to equip your executive with the higher level of leadership skills he or she will need to help your credit union succeed in the challenging times of post-financial crisis America.

The Institute will also address what may be a critical gap in your credit union's succession plan. From your own experience, you know that being a successful CEO demands leadership skills that are a big step beyond those typically found on a senior team. But if yours is like most credit unions, no one on your team is fully prepared to step into your role should circumstances require.

The Faculty

The Institute will be conducted by a distinguished faculty with specialist skills in the areas to be covered:

- **John Gregoire** has 35 years experience in the credit union industry, including senior positions at Schools First FCU and Credit Union National Association (CUNA), and he received his Masters from the Peter Ducker School of Management at Claremont. Since founding ProCon in 1997, John has become a leading advisor and trainer to credit unions on board governance, leadership team development, and succession planning.
- **Ralph Swoboda**, ProCon's other principal, was CEO of CUNA, Management Chair of the Association of British Credit Unions and Head of International for CUNA Mutual Group. Having served on the boards of numerous credit union and financial services companies both in the U.S. and internationally, he brings CEO-level experience and a global perspective on cooperative leadership, governance and strategy.
- **Scott Cooper**, a ProCon Senior Consultant, was President of The Hiebing Group, a marketing/strategy firm with a long client list of Fortune 500 companies, later led the brand turnaround of Famous Footwear as its SVP/Marketing, and now heads his own research, strategy and planning firm, Marketing Engine Group. Scott has co-authored four books on marketing published internationally by McGraw-Hill.
- **William Myers** founded Alternatives Federal Credit Union (Ithaca, NY) and was its CEO for 28 years. A nationally recognized innovator and expert on alternative and community banking, Bill is now a Senior Fellow in the Aspen Institute's Economic Opportunities Program, as well as a ProCon Senior Consultant. His focus will be on practical strategies to profitably reach the broader communities many credit unions now serve.
- **Dr. Mark Benn** is a licensed psychologist, an adjunct professor at Colorado State

University, and the author of *Stories from the Couch and Other Telling Tales* (2008). A nationally respected executive trainer, mediator and keynote presenter on team building, workplace mediation and doing business multi-culturally, Mark is also a ProCon Senior Consultant.

- **Buck Joseph** is Professor Emeritus of Management, Executive Education at the University of Wisconsin-Madison, co-authored the text *Leadership and Vision* published by The New York Times (1999), and is an engaging and thought-provoking presenter with many years of experience in executive development.

In addition, outside speakers who are prominent in the credit union industry will contribute to each session. Additional background on the faculty is at www.theprocongroup.com.

Course Structure

Institute seminars will be delivered around the theme of creating a vision for credit union success in post-financial crisis America. Individual and group activities utilizing case studies and exercises around that theme will provide the practical mechanisms for participants to acquire the necessary knowledge and skills.

Participants will be given required reading assignments before each session, along with individual and group projects, some to be completed between sessions.

Just as important as the formal seminars will be mentoring and coaching by ProCon faculty members during each session and throughout the year. Between times, we will be available to participants by phone and email to help them apply what they learn to the practical leadership challenges they face in their daily work.

Skills Covered

Credit unions are very different from other financial firms because they combine aspects of both commercial banking as well as of voluntary, not-for-profit organizations. Leading them requires a unique mix of skills that will be taught only in a course specifically designed for that purpose. Hence, the Institute will cover:

- Understanding the essential elements of organizational vision and values in a cooperative organization.
- Developing strategic vision and identifying the key pathways toward reaching it.
- Achieving and maintaining a shared vision with volunteer directors and the senior management team.
- Identifying and overcoming organizational barriers to accomplishing the vision.
- Developing and maintaining a strong organizational culture.
- Doing business ethically, for the benefit of members and other stakeholders.
- Developing and implementing a strategic brand strategy.
- Measuring progress toward organizational goals.
- Building and maintaining effective senior management teams.
- Effectively communicating with volunteers, understanding their needs and motivations, and working with them to achieve shared goals.
- Managing relationships with the community, sponsors and other external parties.

Venues and Schedule

Institute sessions will be held at executive conference centers chosen for their excellence in providing an optimal environment for the kind of intensive, high-level training and interaction

that characterizes the Institute. Each four-day session will start with a Sunday evening reception and dinner and conclude with lunch on the following Thursday. The first (January 16-20, 2011) will be at Chaminade in Santa Cruz, CA. The remaining two will be held in June and December 2011, at locations to be determined based on the geographic spread of registered participants.

Value to Your Credit Union

- Increase your “bench strength” by providing a member of your senior team with higher level skills in strategic visioning, business planning, change management, executive team building, working with volunteer boards and community relations.
- Better provide for CEO succession by equipping the individual you see as your “number two” and potential successor with the CEO-level skills he or she needs for the job.
- Bring to your credit union the new insights and knowledge your executive will gain from in-depth interactions with fellow participants from other top credit unions and with ProCon faculty and speakers.
- Recognize and reward one of your “star” performers by affording him or her a unique career development opportunity.

Limited Enrollment

The Institute will be limited to a maximum of sixteen participants. To assure a diversity of backgrounds and viewpoints, there will be no more than one person per credit union. Participation is by invitation only, and registration will be closed on **December 3, 2010**.

Tuition and Costs

The cost per participant will be \$17,500 all inclusive for tuition, lodging and meals during the in-person sessions, course materials, and personal coaching by telephone and email between times.

Payment in full is due by **December 10, 2010**. No refunds will be issued for cancellations after that date. However, the credit union may substitute a different participant by contacting ProCon in writing no later than January 3, 2011.

Registration

We expect that demand for the Institute will exceed the number of places available, so please give this invitation your earliest attention.

Reserve a place for your executive by sending the attached registration form to ProCon at the addresses or fax number shown on the form.



The ProCon Group is a member of Third Way Alliance, an international consortium of credit union advisors in the U.S., United Kingdom, Ireland and Australia.



Reservation Form

Credit Union/CEO Information:	Participant Information:
CU Name:	Name:
CEO Name:	Title:
Address:	Address:
Phone: Email:	Direct Phone: Cell Phone: Fax: Email:
Please note any special needs of the Participant:	

The Credit Union designates the Participant named above to participate in the next series of the ProCon Leadership Institute™, which will be conducted at Chaminade in Santa Cruz, CA (January 16-20, 2011) and at comparable locations in the Central and Eastern U.S. in June and December 2011.

The Credit Union agrees to pay the Institute tuition of \$17,500 (which also covers course materials, meals and lodging for four nights during each of the three Institute sessions, and coaching by phone and email between sessions) no later than **December 10, 2010**. The Credit Union acknowledges that no refunds will be made after that date. However, the Credit Union may designate a different Participant by contacting ProCon in writing no later than January 3, 2011. The Credit Union and/or the Participant will be responsible for the Participant's travel and related costs to and from each session.

Authorized signature on behalf of the Credit Union

Date

Please fax or mail this form when completed, or send a scan by email, to:

The ProCon Group, LLC
606 Ondossagon Way
Madison, WI 53719

Phone: 608-821-1414
Fax: 608-821-1413
Email: scaietti@theprocongroup.com

Reservations must be received by ProCon no later than **December 3, 2010**.