



CENTER FOR  
CREDIT UNION  
LEADERSHIP

## Chief Executive Institute Application (Deadline – August 13)

Name: \_\_\_\_\_ Current position/title: \_\_\_\_\_

Credit Union: \_\_\_\_\_

Branch Address (your location): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

What do you hope to gain from the Chief Executive Institute and why should you be chosen to participate?

## Participation

Full participation is required by each applicant. Participation requirements include:

- Complete all “homework” or in-between session assignments and assessments.
- Payment is required prior to the start of each year's session (October 2021, January 2022)

Tuition is \$11,500 per person and is non-refundable. Payment is due at the time of application. If applying for funding please fill out the Scholarship Funding section and return it with this application by August 13, 2021. NOTE: Funding will occur in two installments one in 2021 and one in 2022. **Session Location** Mountain West Credit Union Association 650 S. Cherry Street, Suite 920 Denver, CO 80246

## Session Dates

Session 1 – October 19-20 (in-person) Organizational Leadership Note, a pre-workshop will be due in September.	Session 6 – January 25 (virtual) Measurement, Analysis and Knowledge
Session 2 – November 2 (virtual) Governance	Session 7 – February 15-16 (in-person) Workforce
Session 3 – November 16 (virtual) Strategic Planning	Session 8 – March 2 (virtual) Voice of the Customer
Individualized sessions – November & December	Session 9 – March 22 (virtual) VOC
Session 4 – December 14 (virtual) Strategic Planning (continued)	Session 10 – April 5 (virtual) Additional Topics
Session 5 – January 12 (virtual) Measurement, Analysis, & Knowledge Management	Session 11 – April 26-27 (in-person) Operational Leadership
	Session 12 – May 17 (virtual) Presentations of Projects

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Participant Signature

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Date

Return this form to Dr. Dan Santangelo, [dsantangelo@mwcu.com](mailto:dsantangelo@mwcu.com) by **August 13, 2021**.

Questions related to the Chief Executive Institute should be directed to: Dr. Dan Santangelo, Executive Director Mountain West Credit Union Foundation at [dsantangelo@mwcu.com](mailto:dsantangelo@mwcu.com) or 720.479.3276.

**Deadline to apply for the 2021 Chief Executive Institute is August 13, 2021**



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**Scholarship Funding  
Chief Executive Institute  
(Deadline – August 13, 2021)**

**Scholarship Funding Application (optional)**

The Mountain West Credit Union Foundation will fund credit union CEOs and Executives that meet the program standards most closely. Candidates will be evaluated based on their submissions. These standards include:

- Operational Leadership
- Leadership Experience
- Community Service and Outside Board Experience
- Leadership Training
- Credit Union Training
- Academic Preparation
- Recognition/Awards

**Tuition: \$11,500**

Selected candidates will be funded at \$8,000 with the remaining fees of \$3,500 to be paid by the candidate or their institution. Tuition is non-refundable and payments will be due in two installments, the first, no later than October 19, 2021, and the second no later than January 10, 2022.

Note: Funding will occur in two installments as well one in 2021, and the second in 2022.

*Please provide information for all of the questions. Additional pages may be submitted with your application. Incomplete applications will not be accepted.*

\_\_\_\_\_ Current position/title: \_\_\_\_\_

Name: \_\_\_\_\_

Credit Union: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Work Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

Years of credit union service: \_\_\_\_\_

Years of experience in your field: \_\_\_\_\_

Years of leadership and executive experience: \_\_\_\_\_

**Operational/Organizational Leadership:** Over the past three years what is the credit union's average for the following:

Asset Growth \_\_\_\_\_ % Share Growth \_\_\_\_\_ % Loan Growth \_\_\_\_\_ %

Membership Growth \_\_\_\_\_ % Return on Assets \_\_\_\_\_ % Net Worth \_\_\_\_\_ %

**Leadership Experience:** Provide a short summary outlining your leadership accomplishments and progress, as well as your plan for professional development (500 word limit).

**Community Service:** Provide a short summary of your community service, boards you have served on or other leadership positions you hold or have held in the past 5 years.

**Leadership Training:** Provide a short summary of your formal leadership training, i.e. leadership principles, leadership theory, or any other formal or academic training.

**Credit Union Training:** Provide a short outline of your credit union training, i.e. Western CUNA Management School, Development Educators, etc.

**Academic Preparation:** Provide a short outline of your formal academics preparation.

**Recognition/Awards:** Provide a short outline of any recognition or awards you have received.

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**Participant Signature**

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**Date**

**Return this form to** Dr. Dan Santangelo, [dsantangelo@mwcua.com](mailto:dsantangelo@mwcua.com) by *August 13, 2021*.

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