

Credit Union Board Member Strategic Capability Self-Assessment

The purpose of this survey is to better understand the professional skills, experience, leadership strengths, and community connections represented on the credit union board. The information will be used to support board development, succession planning, and strategic governance.

Participation is confidential and will be reviewed in aggregate.



Section 1: Professional Background

1. Primary Professional Field(s)

Please select all that apply.

- ☐ Accounting or Finance
- ☐ Financial Institution Experience
- ☐ Risk Management or Compliance
- ☐ Legal
- ☐ Information Technology or Cybersecurity
- ☐ Human Resources
- ☐ Marketing or Communications
- ☐ Operations or Process Improvement
- ☐ Business Ownership or Entrepreneurship
- ☐ Education
- ☐ Healthcare
- ☐ Public Sector or Nonprofit Leadership
- ☐ Other (please specify)

2. Years of Professional Experience

- ☐ Less than 5 years
- ☐ 5 to 10 years
- ☐ 11 to 20 years
- ☐ More than 20 years

3. Current or Most Recent Role or Title: _____

4. Experience with Financial Oversight

Please indicate your level of experience.

- ☐ None
- ☐ Familiarity with financial statements
- ☐ Regular responsibility for reviewing budgets and financial reports
- ☐ Direct responsibility for financial strategy, audit oversight, or capital planning



Credit Union Board Member Strategic Capability Self-Assessment



Section 2: Board and Governance Experience

1. Previous Board or Committee Experience

Please select all that apply.

- ☐ Credit union board or committee
- ☐ Other financial institution board
- ☐ Nonprofit board
- ☐ Corporate board
- ☐ No prior board experience

2. Areas of Governance Experience

Please select all that apply.

- ☐ Strategic planning
- ☐ Chief executive officer evaluation or succession
- ☐ Risk oversight
- ☐ Audit or supervisory committee work
- ☐ Regulatory or compliance oversight
- ☐ Policy development
- ☐ Mergers or partnerships
- ☐ No direct experience

3. Comfort Level with Governance Responsibilities

- ☐ Limited exposure
- ☐ Developing knowledge
- ☐ Confident and experienced
- ☐ Highly experienced and able to mentor others

Credit Union Board Member Strategic Capability Self-Assessment



Section 3: Strategic and Business Experience

1. Experience Contributing to Strategy

Please select all that apply.

Skill	Developing	Proficient	Strong	Exceptional
Setting organizational vision or long range goals				
Evaluating strategic alternatives				
Monitoring performance against strategic goals				
Leading significant organizational change				

2. Risk and Decision Making Experience

How would you describe your experience evaluating complex or high risk decisions?

- ☐ Limited experience
- ☐ Moderate experience
- ☐ Extensive experience
- ☐ Expert level experience



Section 4: Leadership and Interpersonal Skills

1. Leadership Skills

Please rate your proficiency.

Skill	Developing	Proficient	Strong	Exceptional
Collaborative decision making				
Asking constructive questions				
Independent judgment				
Respectful challenge				
Confidentiality and trust				

Credit Union Board Member Strategic Capability Self-Assessment

2. Communication Style

Please select the statements that best describe you.

- ☐ Comfortable participating in group discussions
- ☐ Able to explain complex topics clearly
- ☐ Skilled at listening to diverse viewpoints
- ☐ Willing to raise concerns even when unpopular



Section 5: Community and Field of Membership Connections

1. Connection to the Credit Union Field of Membership

Please describe your relationship to the communities served by the credit union.

2. Community Involvement

Please select all that apply.

- ☐ Employment within the field of membership
- ☐ Volunteer or nonprofit leadership
- ☐ Professional associations tied to the field of membership
- ☐ Advocacy or civic involvement
- ☐ Other community engagement

3. Understanding of Member Needs

- ☐ Limited familiarity
- ☐ General understanding
- ☐ Strong understanding
- ☐ Deep understanding and lived experience

Credit Union Board Member Strategic Capability Self-Assessment



Section 6: Additional Capabilities and Interests

1. Skills or Perspectives You Believe Add Value to the Board

2. Professional Networks or Relationships

Are there professional or community networks you bring that may benefit the credit union?

3. Interest in Future Contribution

Please indicate your interest in:

- Committee leadership
- Mentoring future board members
- Continuing education or governance training
- Strategic initiatives or special projects

Credit Union Board Member Strategic Capability Self-Assessment

4. What additional skills or experiences do you believe the board should prioritize in future recruitment?

5. Based on your responses, what areas do you believe represent opportunities for your continued growth and effectiveness as a board member?
