CEO Roundtable Discussion

Based on the **2026 CEO Pre-Event Questionnaire**, several consistent themes emerged:

- **Membership growth and digital transformation** were the most frequently cited strategic priorities.
- CEOs identified **cybersecurity, competitive pressure, talent development, liquidity, and regulatory risk** as their top concerns.
- Most CEOs feel their boards are highly aligned but need improvement in **technology awareness, strategic discussions, financial understanding, and succession planning**.
- CEOs want discussion around **growth strategies, governance, risk management, succession planning, financial performance, and long-term sustainability**.
- Several CEOs indicated a desire for clearer thinking around **mergers, partnerships, risk appetite, and future viability**.

Given there are only a handful of CEOs attending, I recommend keeping them **all together in one facilitated discussion** rather than splitting into tables.

2026 Tucson Conference

CEO Roundtable Discussion

Governance, Growth & Long-Term Sustainability

Participants: All CEOs

Format: Facilitated Roundtable Discussion

Duration: 60 Minutes

Session Objective

This session is designed to provide CEOs with an opportunity to engage in candid peer-to-peer discussion around the most significant strategic, governance, and operational challenges facing credit unions today.

The discussion topics were developed directly from responses to the 2026 CEO Pre-Event Questionnaire.

The goal is to identify practical insights, challenge assumptions, share best practices, and develop ideas that CEOs can take back to their organizations and boards.

0:00 – 0:05

CEO Roundtable Discussion

Welcome & Opening Question

Opening Question

"What is the single biggest issue keeping you awake at night as a CEO today?"

Allow each CEO approximately 30 seconds to respond.

0:05 – 0:20

Discussion Topic #1

Growth, Relevance & Long-Term Viability

Survey responses identified membership growth, digital transformation, and long-term sustainability as key priorities.

Discussion Questions

1. What does sustainable growth look like over the next five years?
2. How are member expectations changing?
3. What competitive threats concern you most?
4. What strategic decisions are credit unions delaying that need to be addressed?
5. What does long-term viability look like beyond asset size?

Discussion Prompt

"What strategic conversation is your board not having that it should be having?"

0:20 – 0:35

Discussion Topic #2

Board Readiness & Governance Effectiveness

Many CEOs indicated boards need greater understanding of technology, financial performance, risk oversight, and succession planning.

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Discussion Questions

1. Where is management ahead of the board today?
2. How can boards become stronger strategic partners?
3. What board behaviors create the greatest value for CEOs?
4. What governance practices need to evolve?
5. How do we improve board understanding of technology, AI, and emerging risks?

Discussion Prompt

"If you could improve one aspect of your board's effectiveness tomorrow, what would it be?"

0:35 – 0:50

Discussion Topic #3

Risk, Talent & Leadership

Cybersecurity, talent development, succession planning, and regulatory pressure were common concerns.

Discussion Questions

1. What risk concerns you most over the next three years?
2. How prepared is your organization for CEO and executive succession?
3. What talent challenges are most difficult today?
4. How should boards oversee emerging risks without becoming operational?
5. What leadership capabilities will future CEOs need?

Discussion Prompt

"What risk do you believe credit unions are underestimating today?"

0:50 – 0:57

Key Takeaways Exercise

As a group, identify:

CEO Roundtable Discussion

1. The biggest challenge facing CEOs
2. The biggest opportunity for credit unions
3. One governance improvement boards should consider
4. One strategic action CEOs should prioritize during the next 12 months

Record responses for report-out.

0:57 – 1:00

Closing Reflection

Ask each CEO:

"What is one insight or idea you will take back from this discussion?"

Facilitator summarizes key themes and thanks participants.

Expected Outcomes

By the conclusion of the session, CEOs will have:

- Shared perspectives on growth and sustainability
- Discussed governance and board effectiveness
- Explored emerging risks and opportunities
- Identified best practices from peer organizations
- Developed actionable ideas to strengthen leadership and strategic planning
- Created a collective view of the future challenges and opportunities facing credit unions

This format keeps the CEOs together, leverages the strongest survey themes, and creates a candid executive-level conversation that complements the separate Board Director roundtables.

CEO Roundtable Discussion

Facilitator Instructions (All Tables)

0:00 – 0:05

Quick introductions and opening question:

"What is the biggest challenge or opportunity your board will discuss in the next 12 months?"

0:05 – 0:35

Facilitated discussion using the assigned table question.

0:35 – 0:45

Reach consensus on:

- Top challenge
- Top opportunity
- One board action

0:45 – 0:55

Prepare spokesperson and report-out.

0:55 – 1:00

Room-wide summary and closing.

This format will generate ten distinct perspectives that can be synthesized into a powerful conference-wide discussion summary and post-conference board report.