



## DAN CLARK, CCUE

Your audiences of both volunteers and professionals relate easily to Dan—He’s been there. His diverse 40-year credit union background gives him instant credibility. Dan focuses on practical content supported by relevant stories, anecdotes and sound theories. He’ll inspire your people to think, to reevaluate their practices — to challenge the status quo — and to make changes needed to continue their records of success. Experienced as a speaker, presenter, and facilitator, he will educate, engage and entertain your audiences.

*The Seminar was great. I'm working through my notes to create a presentation for my board. You always provide great insight and challenge for board direction. ~Bev Anderson, CU Chair*

**CU Advocate:** Dan realizes that CUs serve two ends of the financial spectrum with guidance and support: credit counseling and investment advisory services. Yet millions of consumers living paycheck to paycheck need help building wealth.

Dan’s “vision is that a strong US middle class — one that is growing in number and in financial strength — owes that rebirth to US credit unions and CU-led financial coaching.”

### Thought Leadership:

**Challenge the Status Quo—** Leaders constantly challenge the current state of things and envision how things could be better. In his regulatory roles Dan saw that board practices had hardly advanced while the business environment had changed dramatically. Dan challenges Boards and executives to examine their decision and planning processes critically.

**Leadership/Governing Boards Delegate—** In the 9th Chapter of “Who’s Driving Credit Unions?” Dan challenged regulators to reevaluate their interpretations of 1930s-era statutory duties; modern-day conditions require that Boards accomplish fiduciary duties through delegation to professionals. Fortunately, NCUA now allows more delegation under ¶103 Fed CU Act; CUs seem unaware. Dan helps CUs clarify roles and work in harmony with effectiveness.

*"Informative, affirmative, and entertaining -- good job!"*

**Be Truly Strategic—** What many CU leaders and regulators call “strategic” is not. Dan shows the way to competitive intelligence and strategy to position clients to succeed in all future scenarios. Boards and executives who develop far-reaching visions, embrace their social responsibilities, and develop a unique strategy & brand, have a better chance of surviving and continuing to be relevant as the future unfolds.

### Diverse credit union background:

- **Regulator:** 1971 Examiner, 1976—1978 State Administrator — Florida
- **Audit services manager and marketing** for service corporation, Florida CU League, 1978—1981
- **Director:** SCORE FCU, Tallahassee, Fla, 1981—1987
- **CEO:** Tallahassee-Leon FCU, Tallahassee, Fla, 1987—2005
- **Consultant:** 1981 and continuing

### Speaker: Keynotes & Workshops

**New**

- Assessing the Board Governance Process: the internal audit function
- Boards as Visionaries; Meeting Social Needs for a Better America
- Governance and Compliance for Boards
- Productive Board Meetings
- Business Ethics
- Directors Who Make a Difference
- Strategic Thinking and Planning
- The Financial Statements in Plain English

more topics and details, go to

[danclark.com](http://danclark.com) >>Services >>[Speaking & Training](#)

## Consultant:

*“You are a true professional, Dan, because despite your nightmarish trip and lack of sleep, you arrived at the registration table looking energetic and ready to go ... The scores are very high and the comments are favorable as well.”*

~Linda Scott, Maine CU League

**Board Governance**— CUES, CUNA and individual CUs are recent clients. Clark’s [governance model](#) meets regulatory standards and the credit union improves its responsiveness and improves the payback from professional staff. Clark wrote a policy manual for a state chartered CU client that became the foundation for board governance at SCORE FCU where he served as Chair. The Ohio League printed hundreds of them as bonus handouts for participants across the state. Several governance topics are available on his [audio CDs](#). Supporting good governance, Dan created the Dashboard File, teaches the original [Financial Statements in Plain English](#), offers [Reach for Excellence Board Self Evaluations](#), and an [E-Governance board portal](#).

**Strategic Planning**— Dan facilitates [visioning and strategy retreats](#). Credit union leaders often call on Dan to take their planning to the next level—to seek farther horizons—and to clarify the Board’s big-picture role (the ends) and management’s business planning role (the tactical means). Strategic planning correlates with the governance structure.

A Read back issues of the “Challenge the Status Quo” eZine at [danclark.com](#) >> Resources

**Innovation**— In 1981, Dan created the first conceptual, “plain English” approach to helping volunteers understand how to read balance sheets and income statements; thousands have benefitted. There are now [several ways](#) credit unions can acquire this training, *very popular after NCUA clarified director training*.

To improve board performance and compliance, Dan prescribes [two information flows](#) for directors.

**Writing**— *Reinventing Credit Unions*, 1990; *Who’s Driving Credit Unions?*, 1997.

Dan now offers Who’s Driving—his governance model for credit unions—as an [e-book](#), More than 235 of his articles and interviews have appeared in CUNA’s *CU Magazine*, *CUES Management Magazine*, *CU Journal*, *HR Magazine* and others. Dan wrote two of the original Volunteer Achievement Program Modules for CUNA: *Board Policies*, and *Planning*, and a new audio course on board oversight. For CUES he has written director education modules. In addition to his [Blog](#), Dan now has a Board Governance video channel on [YouTube](#).

**Decide today where Dan belongs on your 2012 calendar**

To save time by using active links, download this sheet in PDF at [danclark.com](#) >>Resources >>For Meeting Planners

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Mobile office **850-559-7094**

e-mail: **dan@danclark.com**

4156 Pond Cypress Court  
Tallahassee, Florida 32310

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