Credit Union Board Member Matrix

This Board Member Matrix is designed to help evaluate and visualize the collective expertise, experience, and diversity of the credit union's Board of Directors. It supports governance effectiveness, succession planning, and strategic alignment with the organization's mission and goals.

Instructions

List all current board members across the top row and key competencies or experience areas down the left column. Mark each cell to indicate where a director possesses significant expertise or experience (✓). Use this matrix to identify strengths, gaps, and areas for future recruitment or development.

Board Members	Board Chair	Vice Chair	Treasurer	Secretary	Director 1	Director 2	Director 3	Director 4	Director 5
Competency / Experience Area									
Financial Management / Accounting									
Lending and Credit Expertise									
Strategic Planning and Leadership									
Regulatory and Compliance Knowledge									
Member and Community Engagement									

Technology and Cybersecurity									
Risk Management / Audit									
Human Resources / Talent Development									
Marketing and Business Development									
Diversity, Equity, and Inclusion Awareness									
Governance and Policy Development									
Economic and Market Insight									
Mergers, Partnerships, or Expansion Experience									
Advocacy and Government Relations									
Succession and Leadership Planning									