



Evolve U Outline

Stages 1 - 3: The Foundation

The first three stages will lay the foundation for the Academy as we set program expectations, examine the history of credit unions, explore current industry hot topics, and dive deep into financials to understand the metrics you need to know to measure the health of your institution. We will also be able to compare credit unions by introducing you to the NCUA Call Reports.

Learning Topics:

- CU History
- Culture
- Advocacy
- Financials and NCUA Call Reports

Stages 4 - 7: The Mutation

The next four stages will take you through the guts of credit union operations by evaluating different branch operation strategies, how to effectively lend to a diverse group of members, why leadership and training is so important to a successful credit union and examine the compliance risks and pitfalls our industry faces.

Learning Topics:

- Branch Operations
- Leading at All Levels
- Consumer, Real Estate, and Business Lending
- Compliance and Project Management

Stages 8 - 10: The Evolution

The last of the stages will wrap up the Academy by truly digging deep into making evolutionary strategies at your Credit Union. Discuss examples of how deep community engagement and business development can elevate a credit union, how making our money work through investments can generate additional capital and wrap it up with a group project that consists of developing an argument for (or against) a hot topic discussed in the Academy.

Learning Topics:

- Marketing and Business Development
- Investments and Asset Liability Management
- Community Engagement