

Quarterly Action Plan

THREE KEY CREDIT UNION THEMES

- Digital Transformation
- Mining for Growth
- Redefining the Value Proposition

RESEARCH



Increase learning and transform your organization with cutting-edge research addressing the credit union industry's most pressing challenges.

- 1/13 Overdraft Protection Programs: Credit Union Best Practices
- 1/18 Community Social Impact: The Urgency of Now
- 2/18 Buy Now, Pay Later: Understanding Consumer Behavior
- 2/24 Bridging Spatial Divide: A Guide to Achieving DEI in Physical Work Environments
- 3/4 Putting Financial Well-Being for All into Practice
- 3/23 Crypto and Credit Unions
- 3/23 Central Bank Digital Currencies

FOR FILENE'S LATEST RESEARCH VISIT:

[FILENE.ORG/RESEARCH](https://filene.org/research)

BLOGS



Stay current with insights from innovators conducting research, seeking truth, and connecting credit unions.

- 1/18 Callahan's Jon Jeffreys: What is Social Impact?
- 1/18 An Economic Path to Safety: Credit Union Model of Support
- 2/15 Reimagining Financial Trust in a Digital Age

FOR THE LATEST FROM FILENE'S BLOG VISIT:

[FILENE.ORG/BLOG](https://filene.org/blog)

EVENTS & COMMUNITIES



Connect with industry leaders at our events and in our communities.

- 2/26–3/3 Crash the GAC in Washington D.C.
- 2/28 Chairman's Breakfast at CUNA GAC in Washington D.C.

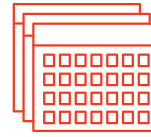
Save the Date

Save your spot for our event in April.

- 4/5–4/7 Virtual Research Event: DEI, Consumer Financial Lives in Transition and Innovation & Incubation
- 4/5–4/7 Crash Filene's Virtual Research Event

REGISTER FOR UPCOMING EVENTS AT:

[FILENE.ORG/EVENTS](https://filene.org/events)



Check-in with your organization's dedicated Filene'er to help review and build a 90-day plan tailored to your team's goals.

ENGAGE@FILENE.ORG

WEBINARS



Join thousands of your credit union peers through Filene's webinar series on the hottest topics impacting the industry.

- 1/19 CU Workplace of the Future
- 1/27 Recovering and Leaping with Multicultural Consumers
- 2/8 Innovation Across the Industry
- 2/17 So You Want to Talk About.... Overdraft Protection Program Panel
- 3/10 Measuring DEI Success in Credit Unions: New Survey Launch
- 3/31 New CUSO Models for Growth & Innovation

REGISTER FOR UPCOMING SESSIONS AT:

[FILENE.ORG/EVENTS](https://filene.org/events)

FIND RECORDINGS TO PAST SESSIONS AT:

[FILENE.ORG/BLOG](https://filene.org/blog)

IMPACT JOURNEYS



Activate and amplify your credit union's progress across biggest issues facing credit unions today.

- Information & Data Technology Leaders**
Impact Journey: Bundled Presentation *(Attend one session)*
2/10 Session #1 3/21 Session #2
- Lending & Finance Leaders**
Impact Journey: Overview Presentation *(Attend one session)*
2/17 Session #1 3/17 Session #2 3/22 Session #3
- Marketing & Experience Leaders**
Impact Journey: Digital Transformation Presentation *(Attend one session)*
3/9 Session # 1 3/15 Session # 2

FILENE IN ACTION



Advance your credit union and the credit union industry.

- 3/1 Launch of The Lab at Filene
- 3/10 Launch of 2nd Annual DEI Survey