


# Quarterly Action Plan

Contact Filene’s membership to help review and build a 90-day plan tailored to your team’s goals.

[ENGAGE@FILENE.ORG](mailto:ENGAGE@FILENE.ORG)

SPOTLIGHT



**INNOVATION INDEX**  
JUNE 9

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**Launch of the first Credit Union Industry Innovation Index**

Don’t miss this opportunity to be a part of the industry’s first innovation index! Participating organizations will receive an individualized index aggregating their responses to identify where they fit within the broader system and specific recommendations for next steps. Participation opens on June 9, 2022 at [filene.org](https://filene.org).

NEXT QUARTER

## SAVE THE DATE

Register today and save your spot for our event in August.

- ■ ■ **8/1-8/2** Hybrid Research Event: Building Your Future through Infrastructures and Ecosystems
- ■ ■ **10/25-10/26** big.bright.minds. 2022

THREE KEY CREDIT UNION THEMES

- DIGITAL TRANSFORMATION
- GROWTH
- VALUE PROPOSITION

THIS QUARTER

## LEARNING JOURNEYS

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

- **Marketing & Experience Leaders**  
4/12 Value Proposition Session
- **Lending & Finance Leaders**  
4/26 Growth Session
- ■ ■ **Information & Data Technology Leaders**  
4/28 Three Themes Session

## EVENTS & COMMUNITIES

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

- ■ **4/5-4/7** Virtual Research Event: Delivering Exponential Growth through Member-Centered Innovation
- ■ **4/5-4/7** Crash Filene’s Virtual Research Event

## WEBINARS

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

- ■ **4/19** Next Step for Innovation
- ■ **5/24** Leading with Heart, Earning Results
- ■ **6/9** Housing Insecurity: A Pervasive Problem
- ■ **6/23** Putting Financial Well-being for All into Practice

NOT A MEMBER?



*Scan the QR code to learn more about becoming a Filene member and unlocking access to an innovative community, unbiased research and tools to put ideas into action.*

REGISTER TODAY



Register for upcoming events and webinars by visiting [filene.org/events](https://filene.org/events).



Stay up-to-date with the latest Filene has to offer. Join our eNewsletter by visiting [filene.org](https://filene.org).

# Upcoming Research

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

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

CENTERS OF EXCELLENCE KEY

- WAR FOR TALENT
- PERFORMANCE & OPERATIONAL EXCELLENCE
- COMMUNITY SOCIAL IMPACT
- INNOVATION & INCUBATION
- DATA ANALYTICS
- DIVERSITY, EQUITY & INCLUSION
- FINANCIAL LIVES IN TRANSITION
- EMERGING TECHNOLOGY

COMING SOON

SPRING 2022

- Credit Union Financial Performance Indicators, Q4, 2021
- The Changing Climate for Credit Unions
- Innovation & Incubation Position Paper
- Building the Modern Credit Union Data Stack to Leverage Analytics Value
- Understanding the Implementation and Impact of ERGs, Part 1

SUMMER 2022

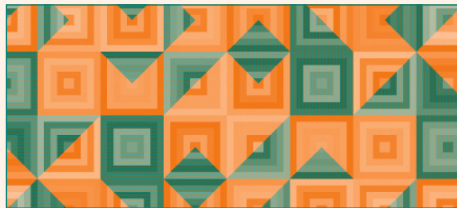
- CU Analytics Adoption Readiness Survey Findings, Year 1
- Credit Union Financial Performance Indicators, Q1, 2022
- Becoming an American: Financial Inclusion for Immigrants

LATER IN 2022

- Toward Justice-Involved Financial Services, Part 2
- Trauma-informed Financial Services
- Trust and Digital Financial Services: Community Credit Discovery
- DEI Policies & Practices Survey
- Credit Union Innovation Index

NOT A MEMBER?

UP NEXT



REPORT #560  
APRIL 12

**The New Hybrid Credit Union Workplace**

After a year and half of pandemic-driven remote work, credit union leaders know that the postpandemic workplace will not (and should not) look the same as it did pre-pandemic. But how can credit unions create office environments that foster collaborative and independent work, build community, and deepen affinity for the organization's culture?

FIND MORE RESEARCH ON WORKPLACE DESIGN AT [FILENE.ORG/TALENT](https://filene.org/TALENT)



Stay up-to-date with the latest Filene has to offer. Join our eNewsletter by visiting [filene.org](https://filene.org).

Contact Filene's membership team to learn how to put Filene's research into action [engage@filene.org](mailto:engage@filene.org)



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