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RECRUITMENT KIT

# THE COOPERATIVE TRUST

CRASH FILENE'S  
CENTERS OF  
EXCELLENCE

**“Youth is  
too serious  
to become  
obedient.”**



**The Cooperative Trust (TCT)** is an Herb Wegner Award winning, community focused on providing opportunities for rising credit union talent—specifically, young and emerging professionals. The goal of TCT is to build a strong network of continuous and collaborative learners, create and curate professional and community development content and experiences, and develop strong loyalty and activism within the credit union industry. Active members of the community develop both personally and professionally—learning, discussing, and practicing an array of topics related to:

- LEADERSHIP
- CREDIT UNION BUSINESS MODELS
- DIVERSITY, EQUITY, & INCLUSION
- INNOVATION & INCUBATION
- DATA ANALYTICS
- CONSUMER LIFE EVENTS
- COMMUNITY DEVELOPMENT
- TALENT: RECRUITING & CULTIVATING

TCT is building this network by curating experiences that create emotional connections. The desired and often accomplished result is a lifelong loyalty to credit unions. The program that amplifies loyalty to credit unions is Crash. Crashing is an experience created by TCT where we bring young and emerging leaders to credit union conferences. Typically, conference registration is covered by the client, and the credit union will cover the “Crashers” expenses. Each Crash creates its own support network, and at times, this network cross-pollinates with other Crash groups, Filene communities, and other credit union young professional and professional development groups.

TCT has about 10,000 community members online, on social media, and engaged with our eNewsletter. The online platform hosts community discussion forums, a blog, and a community message board, as well as additional opportunities to stimulate engagement on the site by developing a mentorship program. Other methods of community engagement include outreach through social media channels, and a monthly newsletter highlighting community members and new research at Filene. Last, we engage with thought leaders in the industry through Cooperative Chats, a LIVE chat show where we discuss a range of leadership topics.

There are several key differentiators that separates TCT from other credit union young professional communities:

- **National exposure to the credit union industry.** Crashers and CT members have access to the top thinkers and leaders in the credit union space through Filene Research Institute and the various Crash experiences.
- **Brand Awareness.** TCT has been around for more than 11 years and made a mark on the industry through the Crash program. The program was honored on 2017 when it received an Herb Wegner Memorial Award for Outstanding Program.
- **Access to key partners.** The awareness of the program has provided the opportunity for TCT to partner with key players in the financial services space, such as, Credit Union National Association, Visa, CUNA Mutual Group, SavvyMoney, and TransUnion.
- **Access to a 2,300-person strong community.** Between our eNewsletter, social communities, and our online platform, we have the ability to reach more than 10K people.

## CRASH FILENE'S CENTERS OF EXCELLENCE

We're thrilled to introduce a new Crash experience, Crash Filene's Centers of Excellence! This new virtual Crash experience aims to engage emerging leaders and rising talent across North America with new content that focuses on research from each of our Centers. Participants will collaborate with other like-minded leaders to gain a holistic perspective on credit unions and how our industry can continue to serve members into the 21<sup>st</sup> century and beyond.

The goal of Crash Filene's CoEs is to provide recognition and reward talent, as well as provide your organization with a tool to take credit union leadership development to the next level.

### PROGRAM OBJECTIVES

- Provide rewards and recognition for emerging leaders
- Build strategic thinking capabilities to ensure talent is ready for new opportunities
- Identify and enhance unique skills to bring diverse perspectives to your organization
- Grow and motivate the community towards action



## FILENE'S CENTERS OF EXCELLENCE AND CRASH FOCUS AREAS

### DIVERSITY, EQUITY & INCLUSION

- How to be an inclusive leader
- How to spot exclusion



### CONSUMER FINANCIAL LIVES IN TRANSITION

- How to support people through emergencies and help members plan for the future
- Qualities that make credit unions and team members successful



### INNOVATION & INCUBATION

- The Filene Method
- How to be a tester



### EMERGING TECHNOLOGY

- Understanding how technology can hinder or help service/member experience



### DATA ANALYTICS & THE FUTURE OF FINANCIAL SERVICES

- Trust building trust, defining what that means for your organization/team



### COMMUNITY SOCIAL IMPACT

- Using metrics to tell a story
- Collaboration—working with partners for the greater good



## RECRUITMENT

Credit unions have the opportunity to select from their top emerging talent to attend the Cooperative Trust Virtual Program. Selected participants should be selected for their contributions to the organization and the community. The ideal participant in Crash will be:

- **Curious:** asks questions, does the research to understand their interests
- **Brave:** challenges why we do the things we do
- **Open-minded:** willing to change their opinion when they learn new information
- **Supportive:** a team player, a servant leader

Equally important to the type of person selected to participate is the support this person has from their boss to spend some time away from the office. There will be a monthly commitment of providing at least three hours of participation time, as well as supporting the attendance at each of Filene's virtual events which will require time away from the office.

## SELECTION PROCESS

The selection process begins with a call to action from the leadership team. The direction will be for leaders to select someone on their team to be considered to attend the virtual crash. Leaders will nominate participants based on a variety of factors:

- **Performance**
  - Achieves organizational and individual performance goals
  - Active community member, volunteers, serves on boards, etc.
- **Ability to “lead from the middle”**
  - Leadership qualities without the leader title
  - New to leadership or new to the organization and shows promise and leadership qualities
- **Aptitude for learning new information**
  - Asks questions when presented with new information
  - Performs research to uncover issues and or solve problems

Once a person is nominated to Crash the credit union can choose from the group of nominations in several ways. For example, by completing a project or interview. We've provided a timeline to follow at the end of this kit.

### OTHER CONSIDERATIONS

Before you begin the selection process, we encourage your team to consider the following:

- Did the leadership team nominate a racially and ethnically diverse group?
- Did the leadership team nominate the same voice as before; meaning, are all of the same team members getting these types of rewards and opportunities?
- Not all emerging leaders and rising talent are extroverts, please ensure a variety of personalities and roles are considered.
- Is there a balance between male and female nominees?



## CANDIDATE PROFILE

Who makes an ideal Crasher?

- **Curious:** asks questions, does the research to understand their interests
- **Brave:** challenges why we do the things we do
- **Open-minded:** willing to change their opinion when they learn new information
- **Supportive:** a team player, a servant leader

This person also...

- Achieves organizational and individual performance goals
- Active community member, volunteers, serves on boards, etc.
- Leadership qualities without the leader title
- New to leadership or new to the organization and shows promise and leadership qualities
- Asks questions when presented with new information
- Performs research to uncover issues and/or solve problems



## CANDIDATE EVALUATION FORM

Use this form to score each nominated candidate to narrow your selection. The first two questions must have a “Yes” answer to further consideration, both are required for successful completion of the program. Typically, selected Crashers score 42 and above.

REQUIRED QUESTIONS	YES	NO
Candidate is currently meeting organizational expectations		
Candidate has support of leadership team to spend at least three hours per month away from their desk, as well as has permission to attend all of Filene’s virtual events (dates TBD)		

Rate candidates on a scale between 1 and 10.

1 = not likely/never, 10 = likely/always.

THIS CANDIDATE NEVER / ALWAYS...	1-10
Volunteers their time at credit union events and or for personal causes	
Views themselves as creative or is regarded as being creative (artistically or in business acumen.)	
Demonstrates a holistic perspective of how the credit union functions	
Demonstrates leadership qualities that align to the credit union mission.	
Shows eagerness to learn more	
<b>TOTAL</b>	

## WELCOME COMMUNICATION

Congratulations «Enter Name»!

«Enter leadership team or person's name» is recognizing your contributions to the «enter credit unions name». They've noticed how hard you've been working to serve your members, team, and community.

To show appreciation you've been selected to participate in The Cooperative Trust's Futures Program. Cooperative Trust Futures was created to foster continued leadership development by connecting emerging leaders (like you!) with other like-minded people, thought leaders, and academics.

You're invited to participate in ten 60–90-minute sessions throughout 2021, as well as attend ALL of Filene Research Institute's Virtual Event and in-person events. We will only ask you a few questions at the end of each session to gauge your interest, what you learned, and how you might be inspired to take action at your credit unions.

Congratulations on being selected for this exciting opportunity!

Sincerely,

Leadership Team

Once you've selected your Crasher, please use the provided link to register your Crasher for Crash Filene's Centers of Excellence. The Cooperative Trust will then reach out to your Crasher with additional details about participation.



## RECRUITING & PROGRAM TIMELINE 2020–2021

### 2020

SEPTEMBER–DECEMBER	Nomination Process
SEPTEMBER–NOVEMBER	Selection Process: conduct interview and project
NOVEMBER	Application opens to all Cooperative Trust Members
DECEMBER	Crasher Announcements

### 2021

JANUARY	Module 1: Filene Research Institute & The Cooperative Trust
FEBRUARY	Module 2: Data Analytics & The Future of Financial Services
MARCH	Module 3: Community Social Impact
APRIL	Module 4: Consumer Financial Lives in Transition
MAY	Module 5: Diversity Equity and Inclusion
JUNE	*Sponsored Module*
JULY	Module 6: Innovation & Incubation
AUGUST	Module 7: Emerging Technology; Nomination Process
SEPTEMBER	*Sponsored Module*; Nomination Process
OCTOBER	Module 8: Wrap-up; Selection Process, Application Opens to all Cooperative Trust Members
NOVEMBER	Selection Process
DECEMBER	Crasher Announcements

