

Quarterly Action Plan

Contact Filene's membership team for a review of your organization's current benefits and ways to maximize membership for every team member.

ENGAGE@FILENE.ORG

SPOTLIGHT



FILAB SYMPOSIUM 2025

AUGUST 26-28, 2025 | MADISON, WI

At this exclusive event, attendees will have the chance to set the future direction of FiLab by voting on and establishing the testing agenda for the upcoming year. Join us to strengthen your networks, exchange valuable insights, and drive forward the collective goal of industry-wide innovation. Agenda highlights include:

- Credit Union Landscape: Trends, Challenges and Solution Pathways
- FinTech and Solution Provider Pitch Sessions and Q&A, Addressing Today's Top Challenges
- 2025 Test Result Insights and Lessons Learned
- 2026 FiLab Test Voting
- Dinners, Networking and Special Activities!

Learn more:

FILENE.ORG/FILABSYMPOSIUM2025

THIS QUARTER

EVENTS & COMMUNITIES

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

- | | |
|-----------|--|
| 7/11-7/17 | Crash the World Credit Union Conference
<i>Stockholm, Sweden</i> |
| 7/24 | Filene Summer Roadshow: The Future Of...
<i>Columbia, MD</i> |
| 7/28-8/1 | Crash DCUC'S 2025 Annual Conference
<i>Palm Desert, CA</i> |
| 8/26-8/28 | FiLab Symposium 2025
<i>Madison, WI</i> |

WEBINARS

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

- | | |
|------|---|
| 7/10 | Your Roadmap to Excellence:
Understanding Membership Options at Filene |
| 7/22 | Center for Member Well-Being Launch |
| 8/5 | New CEO Session (exclusive) |
| 8/6 | The Credit Union of the Future (members-only) |
| 9/4 | Big Deposits in a Short Time: CU Case Studies |
| 9/16 | Hot Topic: Research Updates |

UPCOMING EVENTS

2025 EVENTS FORECAST

- | | |
|-------------|--|
| 10/22 | Filene Fall Roadshow: The Future of...
<i>Tustin, CA</i> |
| 12/01-12/05 | Crash Filene's big.bright.minds. 2025
<i>Nashville, TN</i> |
| 12/02-12/04 | Annual Member Meeting
& big.bright.minds. 2025
(Registration LIVE — late July)
<i>Nashville, TN</i> |

REGISTER TODAY



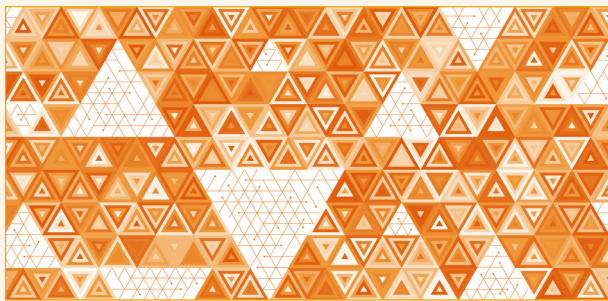
Events and webinars subject to change visit filene.org/events for the most up-to-date information and to register for Filene events and webinars.

What's New?

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)

SPOTLIGHT



DESIGN FOR DIGITAL BLOG SERIES

In this three-part blog series, Design for Digital fellow Dr. Jerry Kane draws on his extensive cross-industry research on digital transformation and conversations with over 20 credit union executive teams to begin diving into three themes that will be central to his research over the course of the center:

1. While technology is important, employees are the center of successful digital transformations
2. A successful digital transformation relies on a well-crafted and broadly shared digital strategy
3. Credit unions need to lean into their unique member-centric brands and value propositions to compete digitally

Each blog discusses why these themes are important, shares some success stories from other industries, and gives some tactical tips and tricks to get started. Stay tuned within the center for more detailed pieces relating to each of these topics!



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

RECENTLY RELEASED RESEARCH

- Credit Union Boards, Govern Thyselves
- Designing Your Organization for a Digital World: It's Not About Technology—It's About People
- Crafting a Winning Digital Strategy: Essential Insights for Credit Union Executives
- Credit Union Governance Risk Assessment Tool
- Going Digital Without Losing Distinction: Credit Unions and the Power of Personalization
- FiLab: Credit Union Landscape Report

COMING SOON

- Gen Z Financial Headwinds
- Results Overview of Filene's Center of Excellence for Diversity, Equity & Inclusion Impact Report
- Housing Series Part 1: Innovations in Cooperative Housing Models
- CDFI Learnings & Impacts
- Global Payments Innovations
- Housing Series Part 2: A Roadmap for Creating an Affordable Housing Investment Fund
- Attitude and Behavior Gaps Among Younger Members
- Results Overview of Filene's Center of Excellence for Innovation & Incubation
- Broader Analytics Ecosystem
- Next Generation Credit Union Benchmarking Survey
- Financial Services Social Media Engagement Analysis
- Housing Series Part 3: Creative Land Assembly and Acquisition

TOPICS KEY

- | | |
|------------------------------|-------------------------------------|
| ■ COMMUNITY SOCIAL IMPACT | ■ DIVERSITY, EQUITY & INCLUSION |
| ■ CREDIT UNION OF THE FUTURE | ■ INNOVATION & INCUBATION |
| ■ DATA ANALYTICS | ■ LEADERSHIP, STRATEGY & GOVERNANCE |
| ■ DESIGN FOR DIGITAL | ■ NEXT GENERATION OF MEMBER GROWTH |



Stay up-to-date with the latest Filene has to offer.
Join our eNewsletter by visiting filene.org.