



## LCUL's 2016 Membership Survey Results

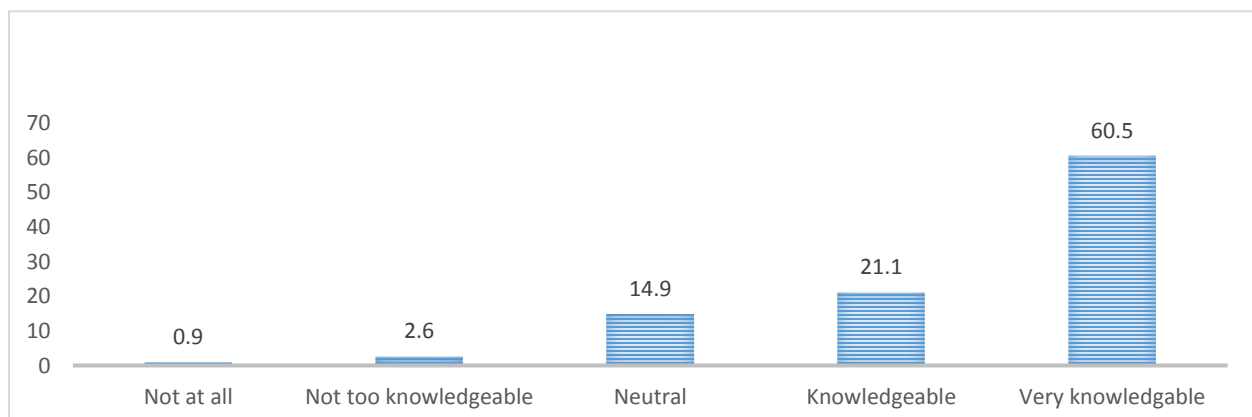
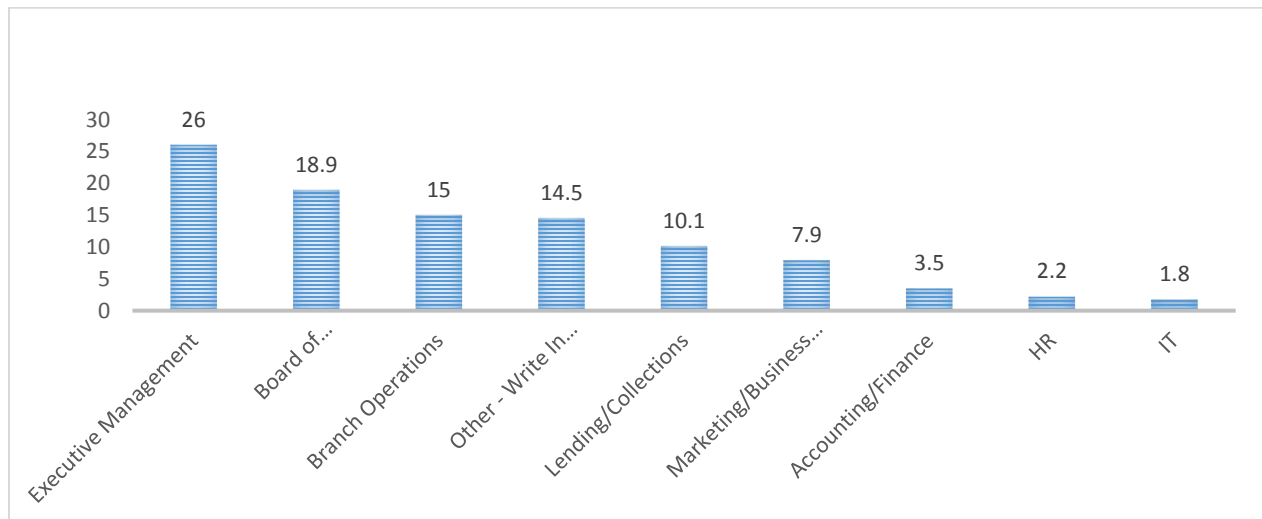
**Background.** In December 2016, the Louisiana Credit Union League used a third party firm to get feedback via a membership survey. The purpose of this was to learn about the following:

- Member knowledge of LCUL programs;
- Feedback on programs and services
  - What matters most to our membership?
  - How do we add value for members? How can we add even more value in the future?
- Interactions with LCUL staff.

**Distribution.** The survey was distributed to more than 1,400 emails in our internal database and included both professionals and volunteers. Communication surrounding the survey was frequent, encouraging as many people to participate as possible.

**Respondents.** Although the survey was distributed at an extremely busy time for credit unions at year-end, we received approximately 230 respondents. There was a cross-section of job titles and levels of experience from those who participated.

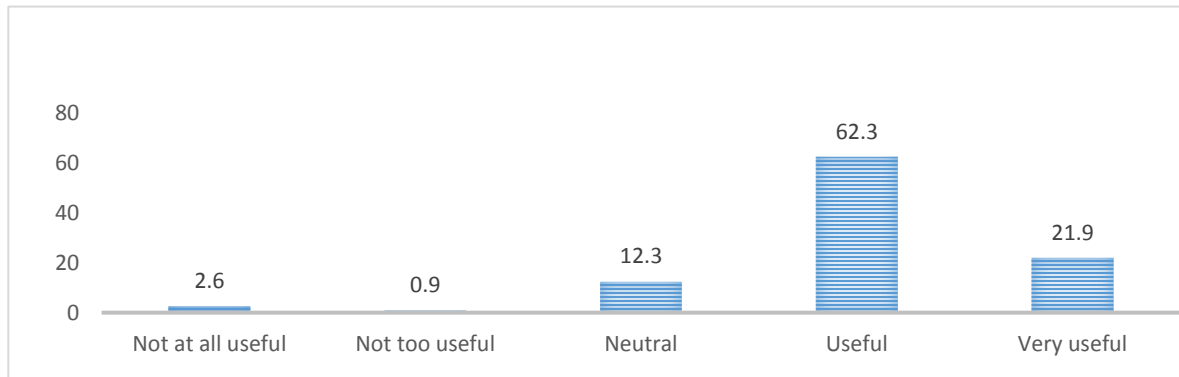
- Majority of respondents have been in the credit union industry more than five years;
- 81.6% of respondents said to be knowledgeable about league services so feedback was valid and useful.



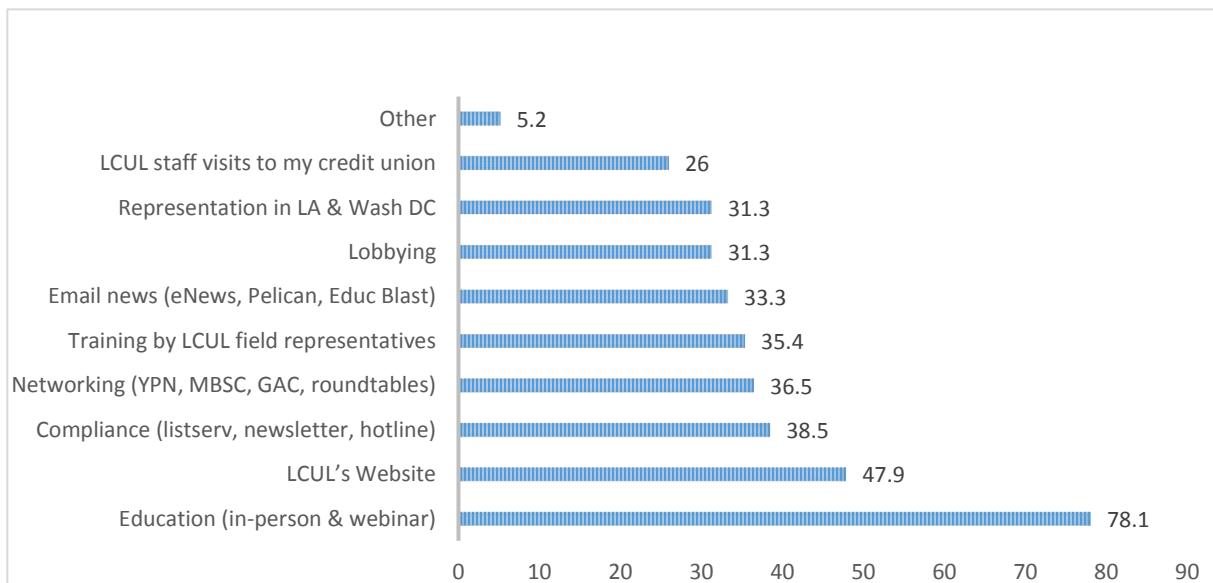


### Summary of Results.

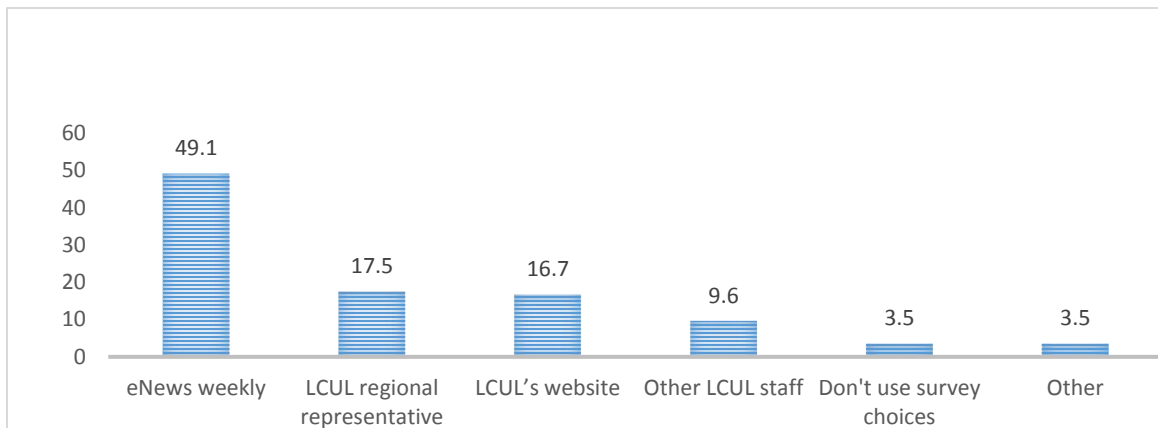
- Thinking about 2016, we asked participants to rate LCUL as an overall resource in terms of usefulness to your credit union:
  - 86% of respondents find it useful



- Those who answered very useful or useful, we then asked which services/programs did they find are the most useful.
  - Most useful was education and website resources;
  - Advocacy wasn't as high as we thought;
  - Staff visits were found as least useful.

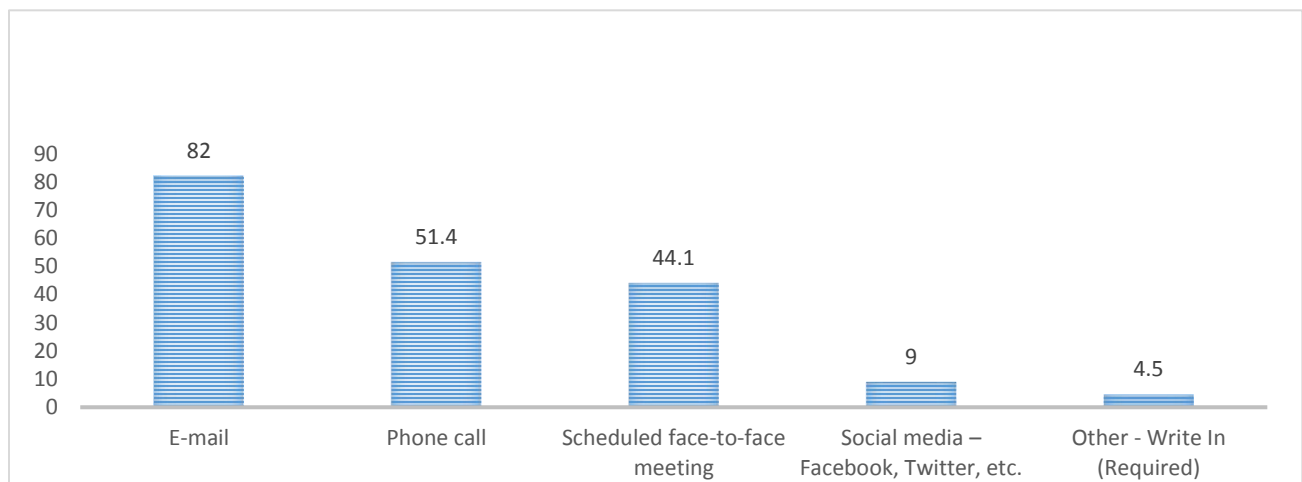


- Participants were asked which method is used most often to find out about the services available from LCUL.
  - Based on comments, learned that communication is essential;*
  - channel used most to find out about LCUL services is eNews.*



- Participants were asked to provide feedback about how we can improve League services listed: training by LCUL field representatives, education programs, LCUL staff visits, lobbying, compliance, LCUL's website, publications, networking opportunities, representation of the movement in Louisiana and in Washington D.C. Things we learned:
  - we need to look into more innovative ways to conduct trainings;*
  - need to advertise our trainings more/better;*
  - our time focusing on website has been well received.*
- One of the challenges for LCUL is keeping the board and executive management of credit unions updated on the credit union staff's overall usage of LCUL's services. What is the best way to meet this challenge?
  - 45% said provide a quarterly report of our credit union's overall usage of LCUL's services;*
  - 30.3% said provide an annual report of our credit union's overall usage of LCUL's services.*
- Thinking about 2016, we asked participants to rate the frequency of their interactions with members of the League's staff. What we learned:
  - we need to be more visible with visits for a specific reason*
  - Comments on interactions with LCUL staff...
    - "I feel very taken care of by the League. I know that if I have a specific question, they can put me in touch with someone with the answer"*
    - "The only interaction I had with the League staff was during testing for the financial counseling; the experience was wonderful"*

- *“There is no value in ‘meeting for the sake of meeting’. The concern should not be about frequency, but content. I would be satisfied with meeting one time per year if there is value in that meeting.”*
  - *“My interactions are always informative and warm, but I would love more personal contact that are not generic. I find that when I talk to reps one-on-one, I tend to get more out of it and the conversation tends to gear towards my needs.”*
  - *“Receive few visits but visits aren’t necessary or even desired. When we call they, get back to us”*
  - *“I do not directly interact with League’s staff since I am a volunteer. However, our CU staff does interact and would be better able to answer if they are satisfied or not”*
- LCUL offers planning session facilitation to all credit unions as a dues-supported service. In 2016, has your credit union received a planning session conducted by a member of LCUL’s staff?
    - *56.9% said no, 19.3% said yes;*
    - *23.9% said they were unaware that LCUL offered this;*
    - *What we learned: need to make adjustments as to how/when we offer these planning sessions*
  - Participants were asked how do they prefer to interact with LCUL. What we learned:
    - *Participants don’t necessarily prefer face to face interaction;*
    - *we need to provide face to face meeting with substance.*



#### **Additional Comments.**

- *“I’d like to know if the league can offer suggestions as how we can improve attendance at local chapter functions.”*
- *“More CU personnel should know more about the league and what it has to offer credit unions.”*

- *“Send out a ‘menu’ of dues-supported services.”*
- *“Be bold in 2017, embrace the future changes for the credit union movement and help educate all those credit unions to survive.”*
- *“Continue to work with the LCUL to improve products and services to the membership.”*

#### **LCUL Next Steps**

- Cross promotion across channels
- Develop regular reporting (staff time)
- Contact management challenges
- Segment services – small CU vs large CU
- Increase networking opportunities (Peer Groups)
- Use on-line meetings to reach broader audience
- Communicate the “behind the scenes”
- LCUL staff messaging
- League orientation