



DUES-SUPPORTED CUSUPPORT

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Financial Analysis Resources

For affiliated Louisiana credit unions, you may use Callahan and Associates financial analysis program, CU Analyzer at no cost. To log in visit this site: http://cualyzer.com/cua_main.htm?displayID=&primary=&comparisons=

In addition, your [CU support team](#) can work with you to look at other specific financial analysis such as peer budget comparisons, ratios, and other financial basics.

Strategic Planning Resources

The Louisiana Credit Union League has a variety of strategic planning sessions available for you at no additional cost, that can be tailored to your available time and level of need. We offer:

CU DNA: (2 hours) A look at your mission, vision, core values, core competencies, and your culture and brand.

Developing credit union planning: (1.5 to 2 hours) This session provides a basic situation analysis, financial goals, identifies focus areas and lays groundwork for a one year "to do" list.

Achieving credit union planning: (2-4 hours) Provides the basic situation analysis, a bit more in depth financial review, and external environmental review. You will also develop your key focus areas, with goals, objectives, and tasks, along with training to write action plans and use mind maps.

Innovating credit union planning: (full day) For credit unions willing to devote a full day to the planning process, you can get the basics, and explore alternative ways to analyze your performance, such as Balanced Scorecard. This session includes more in depth financial review and resources. In addition, you may schedule a follow up session for management to understand how to move the plan forward.

For each of these sessions you will receive a written plan, customizable to your needs.

Training from the Louisiana Credit Union League

1. Bank Secrecy Act (updated annually)
2. Security
3. Member Service Series
 - a. *BEST Member Service*
 - b. *Time Management*
 - c. *Benefits Awareness (sales w/ a positive spin)*
4. The LCUL Advantage (periodic League orientation)
5. Credit Union Peers and Peer Analysis
6. Board Orientation and Development
7. Supervisory Committee Orientation and Development
8. Marketing
9. Credit and Lending for Credit Union Professionals
10. Managing Credit for Credit Union Members
11. Financial Literacy
 - a. *Financial Statements*
 - b. *Financial Performance Trends and Ratios*
 - c. *Risk and Asset Liability Management*
12. ALICE Active Shooter Training (*customized; add. fee*)

Periodic chapter level training on a variety of these subjects will be delivered, and sessions can be scheduled with advance notice. Special training days are offered on a first come, first served basis, and availability may be limited.

Contact a member of the [CU Support Team](#) to schedule your training or request a chapter level program.