

INTRODUCTION



VISION

The financial well-being of Montanans is paramount. Therefore, we are a catalyst for credit unions to encourage collaboration, leverage emerging trends, and increase engagement to deepen relationships and foster growth through advocacy, education, and storytelling.

ADVOCACY

77 bills were monitored by MCU in the 2023 Montana Legislative Session, 24 of which were identified as critical to our industry.

[Learn More](#)

ADVOCACY

Our partnership with HerMoney & Filene has allowed us to run a multi-channel financial education campaign to help position credit unions as the financial institution of choice.



posted daily content to five social media channels



published weekly blog posts



repurposed content for MT DEQ financial wellness classes*

ADVOCACY

Montana Credit Unions for Community Development (MCUCD) by the numbers:

- **\$20,524** was raised through personal giving, donations, and fundraising events.
- **20** professionals obtained CCUFC designation through the FICEP program.
- **75+** participants from the Montana Department of Environmental Quality attended* financial wellness classes presented by CCUFC designees.
- **\$24,500** was distributed through the MT WINcentive program.
- **1003** members at **7** participating credit unions saved **\$861,809** in their WINcentive accounts.

[Learn More](#)

ADVOCACY

\$30,092



was raised by participating credit unions for Credit Unions for Kids and Shodiar Children's Hospital.

ADVOCACY

\$30,518 was raised by **16** of Montana's credit unions and their members. These funds support the election or reelection of candidates who support the goals of credit unions and support lobbying efforts at the local, state, and federal levels.

50% **stays in state** to support credit union friendly candidates, party events, and programs.

50% **goes to CULAC** — the national PAC — who supports federal candidates.

EDUCATION

Offered **8** in-person professional development events with dozens of breakout sessions offering credit union-specific education and valuable face-to-face networking opportunities with strategic partners.

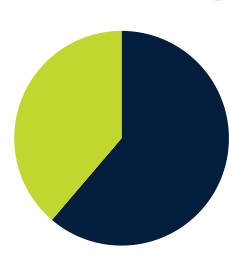
- 36** vendors at PowerUp
- 16** vendors at Be Fearless
- 18** vendors at MonDak

NOTE: Strategic Partner participation allows you to learn about their valuable services and helps keep registrations costs low. Thank you to our vendors!

[Register for an event](#)

EDUCATION

178 professionals completed notary training.



109 credit union professionals

69 professionals from other organizations

EDUCATION

93 educational blogs were published.

140 informative newsletters were emailed.



EDUCATION

Compliance



500+

Contacts on the Compliance Hotline



60

Compliance Officers and Lending Community Listservs Discussions



9

Back-to-Basics Compliance Webinars



"[The back-to-basics webinars are] great trainings for them to build their knowledge base. This being free to us is above and beyond for MCU, and I am grateful for this!"

COLLABORATION

Through our partnerships with CU Webinar Network and OnCourse Learning,* credit union professionals in Montana attended **252** webinars.

*A new partnership in 2023.

COLLABORATION

16 communities provide networking and education to credit union professionals at all stages of their career.



- Hosted the first Women's Community Reset event
- Added the Internal Auditor's Community

"[Take the Lead] has really grown not only my leadership skills but also my confidence as a leader."

[Join a Community](#)

COLLABORATION



38 people were matched through the Tri-State Mentor Match program.

GROUP BENEFITS TRUST



- Hosted the first MCU Group Benefits Trust Collaboration in Wellness event
- Added vendor FedLogic to provide state and federal benefit information and advocacy
- Added vendor Cancer Expert Now to connect patients with world-class physicians. They offer guidance after a cancer diagnosis via audio or video

534

lives were covered by the Group Benefits Trust in 2023.

- **19** trustee meetings held
- **39** new hire enrollment meetings hosted
- **>2,500** contacts made to answer questions throughout the year and during open enrollment

"I loved the sharing of information [at the Collaboration in Wellness event]. While I knew technically what all of the vendors and partners offered, it was so much more thorough and offered the human connection that just can't be replicated in a handout."

Editor's Note: Perhaps the most impactful occurrence of the year was the hire of Gerry Singleton as President/CEO. Based on his accomplishments and leadership in the first seven months of his position, the league is in good hands to continue supporting our members in 2024 and beyond.