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**Training Plan Expanded**

**with Classroom Training**

Email & Training Room Delivery with Video

Additional emails customized to your own credit union

**Monday, October 10 (Columbus Day, adjust if closed for the Holiday)**

**Introduction Email to Staff**

Next week is International Credit Union Week and we will be working with the Southwest Washington Chapter of Credit Unions to bring you education, inspire you, and reinforce the excellent, rewarding career choice you have made at your credit union. Throughout this week, we will highlight the unique aspects of the Credit Union Movement and Philosophy to help you learn about what makes us different. In addition to emails, we will have exciting opportunities to win prizes, and you’ll be invited to a 30-minute training session soon. Keep your eyes out for this opportunity.

Today, we will learn about the pioneers of the credit union movement. Several people dedicated their time and effort towards the idea of building a financial cooperative. They endured challenges and struggles, but continued to pursue the dream of people pooling their money together and making loans to each other. Today’s information will highlight four key players in our industry’s movement, and the unique role they each played in the Credit Union Movement.
<http://www.swwchapter.org/pioneers.html>

**Wednesday, October 12**

**Email to Staff, #2**

Now that you know more about the pioneers of the credit union movement, we’d like to share information about the timeline of events that have led up to today. Take some time and review this important timeline and learn all about the history of the Credit Union Movement.
<http://www.swwchapter.org/timeline.html>

**Thursday, October 13**

**Email to Staff, #3**

Yesterday, you learned about the overall history of the Credit Union Movement. Today, we’d like to take an opportunity to show off our OWN history! Enjoy this timeline and pictures that proudly portray how we have evolved over the years.

Trainer Note: Complete and insert your own CU History timeline and pictures from your past.

**Friday, October 14**

**Email to Staff, #4**

Happy Friday, everyone!

Today’s credit union education is going to take you all around the world. To end the week, we’d like to share how credit unions are represented throughout the world, in addition to all of the organizations that we belong to as a credit union. There are a lot of pieces to the pie, as you will soon discover!
<http://www.swwchapter.org/worldwide.html>

Trainer Note: **FRIDAY OPTIONAL TOUCHPOINT**

Send staff email: “What is one thing you learned this week about CU History or the CU Movement?” Employees who respond can be put into a drawing to win random prizes provided by your CU. Announce the winners and their stories on your own internal channels. < Prize suggestions could be: Your own CU gear, logo wear, prime parking for a week, coffee gift card, Subway, movies, iTunes, etc. >

**Monday, October 17**

**Email to Staff, #5**

It’s a great time to be working at a Credit Union – it’s finally arrived….International Credit Union Week!!!

So – what’s the big deal, anyway? Well….that’s what we want to share today. We have a LOT to be proud of, and several things make credit unions different than other financial institutions. As we begin our celebration this week, we want to celebrate those differences! Check out the CU Difference today.

<http://www.swwchapter.org/cudifference.html>

**Wednesday, October 19**

**Email to Staff, #6**

Do you ever shop at REI? How about ACE Hardware? If so, you have supported a COOPERATIVE! As you know, credit unions are a financial cooperatives, and we’d like to share the cooperative principles with you today. As you review these seven principles, consider how they apply to our credit union world. In addition, we’d like to know how you are living these principles in your credit union life and highlight some of the stories of our own staff that show “Concern for Community” or “Cooperation among Cooperatives,” or any other principle you emulate. Reply back by the end of the day today with an example and you’ll go into a random drawing. We’ll highlight some of the replies tomorrow.

**Trainer Note:** Track replies, select a random winner and get ready to publish in the am to your own internal channels. (Your CU would provide a prize if you choose to give one)

**Thursday, October 20**

**Email to Staff, #7**

 **(graphic can be downloaded at** [**http://www.swwchapter.org/resources.html**](http://www.swwchapter.org/resources.html) **)**

Yesterday, we received several stories on how we are supporting the cooperative principals. Our random winner was \_\_\_\_\_\_\_\_\_\_\_. Congrats! Here are a few stories that really stood out:

Story One

Story Two

On that fabulous note, today is International Credit Union Day. You’ve recently learned a lot about our history and philosophy. Today, instead of hearing from US, we want to hear more from YOU! It’s simple. Reply back to this email by the end of the day and let us know ***what makes you proud to work within the Credit Union Movement***. We’ll share the replies (anonymously) with everyone tomorrow, and one random winner will win a fabulous prize.

Trainer Note: Track replies, publish on your internal channels as desired, announce winner via email. Select a random winner from entries. (Your CU would provide a prize if you choose to give one.) You can even incorporate into text for Friday, October 21 email if desired.

**Friday, October 21**

**Email to Staff, #8**

While it may be the end of International Credit Union Week, with your help the credit union spirit will continue. Every single day, you make a difference in the lives of our members and your co-workers. You are saving our members money and fulfilling their financial dreams. Equally important, you may have a back office or supporting role in this process by making a co-workers job easier, or providing information and resources so they can help our members. We are all keeping the movement alive, and living the seven principles of cooperation. We want to recognize you for doing that, and share your stories with OTHER credit unions!

Beginning today, you can submit your story on how you make a difference and keep the Credit Union Movement alive by clicking here. Top finalists will be chosen by the SW Washington Chapter of CUs and other CU employees from all over SW Washington will get to vote on the story that best represents the Credit Union Movement. The winner will receive a grand prize of $200 provided by the SW WA Chapter of Credit Unions. Don’t hesitate to enter your story – you are doing WONDERFUL things out there!
<http://www.swwchapter.org/stories.html>

**Contest Reminder**

**Staff Email**

**October 28**

Happy Friday! As a reminder, don’t forget to turn in your story of how you are making a difference in your members’ or co-workers’ lives. Have you helped someone to reach a financial goal? Have you supported a staff member and ultimately helped a member? Have you exemplified one of the seven cooperative principles? Tell us about it! Click here, share your story, and possibly win a prize!
Deadline for entry is November 3rd, good luck!

<http://www.swwchapter.org/stories.html>

**Voting Announcement**

**Staff Email**

**November 10th (wait for final announcement and URL from Chapter before sending out)**

While you may have been inspired learning about pioneers and the Credit Union Movement, our modern day stories will inspire you, as well. Click here to read the finalists’ stories that members of the SW WA Chapter of Credit Unions have had submitted, and take some time to vote on one that you believe best represents the CU Movement.

Grand prize winner will receive $200! Good luck to our finalists!

*This URL will be provided upon completion of the finalist stories*

**CONTEST TIMELINE:**

Friday, Oct 21st Announce Contest to CU employees

Oct 28th – Reminder email about the contest and deadline

Nov 3rd – Deadline for story submissions

Nov 8th – SW WA Chapter Board votes on finalists from all entries. 3-5 are selected based on number of entries

Nov 10th – Voting is opened and announced to staff

Nov 17th – Voting ends at 5pm and winner is selected

Nov 18th – Winner is announced via email to chapter distribution group. Point people forward the email to their CUs.

**CLASSROOM TRAINING FORMAT**

Trainer Note:

Schedule accordingly for your credit union, send out invites week of October 10 for each employee’s session. Recommended 15-20 per class, begin after initial exposure in Week One.

Staff Training, Week of October 17, perhaps longer if needed.

Outline:

:00-:05 Welcome and review of the items in Week One

Show slide of a few pioneers and ask the group, which one stood out to you the most and why?

Show a few pics of your own history, and ask, “What did you learn about our own history?”

Closing question: What other questions or comments do you have on the pioneers, history, timeline or structure of our worldwide system?

:05-:08 Show video

Introduce video by explaining, “Your local SW WA Chapter of Credit Unions has provided all of the material for the emails and education over the last few weeks. As part of the education, they asked some random people what they knew about credit unions. Let’s take a look.”

After video, “What did you find interesting about this video?” Debrief

:08-:13 Review the CU Difference Chart (<http://www.swwchapter.org/cudifference.html>)

Ask, “What did you already know?” “What was new information?” Debrief, answer any questions

:12-:17 Show CU Cooperative Principles Video (<http://www.swwchapter.org/7principles.html>)

Explain, “One of the emails focused on the Cooperative Principles. Let’s take a look at that a little further.” After video, “What questions or comments do you have?”

:17-:26 Cooperative Principles Exercise

Split into groups of 3-4, assign principle(s) to group (be prepared with a printout of each principle and description), have them discuss how your credit union participates in each of the principles. Let them work for 4-5 minutes, then debrief quickly.

:26-:30 Individual Exercise

Handout with a simple line (prepared by you). “I am proud to be part of the CU Movement because I \_\_\_\_\_\_\_\_” (fill in the blank). Ask a few to share responses.