



# STRATEGIC PLAN SUMMARY

# Our Purpose, Values, and Strategy— and How It All Ties Together



## WHY WE EXIST

This section provides clarity around our mission and vision, or, who we are and why we we're here.



## HOW WE WORK

Our core values, or Team DNA, is delineated and discussed as well as its impact on daily life at the credit union.



## HOW WE ALIGN

These components are both interrelated and interdependent, and we'll dig into that here.

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## WHY WE EXIST

It's imperative to have clarity around our "why."

Internally, our mission and long-term vision is what helps our team and volunteers understand why what we do here matters, and what we are becoming.

Externally, our purpose plays a critical role in preventing us from becoming commoditized within our field of membership.



## OUR MISSION

To improve our communities and the financial lives of our members.



## OUR VISION

MCCU is THE member-owned banking solution for those who are focused on living better lives, creating their own paths to success, and building a better community. Whether starting up, starting out, or starting over, MCCU connects members to their passions, hobbies, and financial goals.



# HOW WE WORK

Our “core values” serve as a set of principles that guide the day-to-day life inside our organization. They are the set of collective organizational attributes that govern our actions, attitudes, and behaviors; makes us unique; and essentially answers the question, “How do we do life here at MCCU?”

These values integrate into hiring, retaining, and developing our team for years to come and serve as behavioral guideposts for our organization, and are collectively owned by all employees and volunteers. These values can be identified, demonstrated, taught, coached, recognized, and even shared externally. This is a years-long endeavor; and truly the work of maintaining a healthy, high-performing company culture is never done. It’s ongoing, and it’s intentional.

## OUR VALUES



### Service

- Consistently kind to others
- Hospitable & Polite
- Service and Relationship Oriented



### Optimism

- Consistently positive with all
- Fully engaged with team and member interactions
- Be a positive change agent



### Humanness

- Assume and Practice positive Intent
- Seek and Offer Feedback and Ideas
- Be Candid and Kind



### Momentum

- Take Initiative to Learn, Grow, and Teach
- Look for opportunities to be creative and curious
- Employ a growth mindset, individually and organizationally

# HOW WE ALIGN

VALUES. STRATEGY. BANKING

Why We Exist isn't the same as How We Work, but they're related ideas that impact each other. They will leave their imprint on how MCCU begins to function as an organizational entity, and how we share our values with others in our community.

## OUR Values, Inside and Out



SERVICE



OPTIMISM



HUMANNESS



MOMENTUM

### INTERNALLY

### ORGANIZATIONALLY

Consistently kind to others. Hospitable & polite. Service & relationship oriented	Positive attitude with all. Fully engaged with team & member interactions. Positive change agents.	Practice positive intent. Candid and kind. Offer and receives feedback; share ideas.	Take initiative to learn, grow, and teach. Be curious and creative. Employ growth mindset, individually & organizationally.
Consistently meet or exceed service expectations. Reflect & promote our community's hospitable feel of kindness and mutual respect.	Have an optimistic outlook of our members, community, and future. Equip our members to see possibility in their financial goals. Build relationships with members and community. Cultivate curiosity.	Practice positive intent, own member issues to resolution. Break down "corporate" wall. Speak, think, and act like humans, not robots. Become trusted partner.	Grow in organizational self-awareness; adopt posture of learning, growth, and improvement. Develop organizational growth mindset; one where people enjoy and thrive through challenges.



## FOUNDATIONAL STRATEGIC PRINCIPLES

## OUR ONGOING FOUNDATIONAL STRATEGIC PRINCIPLES, ALIGNED

Project-based priorities will come and go, so we believe it is important to solidify our foundation. Below are the fundamental, never-changing, strategic principles that are always important for us here at MCCU. And we believe all are in line with, and relate closely to, our values, at team and organizational levels.

MEMBER SATISFACTION	COMMUNITY	STRUCTURAL RESILIENCE	EMPLOYEE ENGAGEMENT	OPERATIONAL EXCELLENCE	MEMBERSHIP GROWTH
We are a service first organization, striving to exceed member expectations.	We invest our time, talent, and resources in the community we serve.	We are safe, sound, and can take smart risks because of strong net income capital levels.	We are a great place to work, attracting and retaining talent focused on living our values.	We seek automation, efficiency in processes and systems, and invest in technology to help us do so.	We are committed to marketing that differentiates, relates, and breaks through the noise for our ideal member.



# SUMMARY

Why do we need a plan?	To align current and future partners, staff, examiners, and volunteers on the bigger picture for serving our membership. Lack of strategy can lead to lowered efficiency with our resources, distraction, and disconnected goals. This plan creates bumper rails on a purposeful and specific pathway.
Who owns it?	The “grand strategy” or mission, vision, values, and long-term goal is approved by the Board of Directors. The executive strategy is determined through the CEO and other members of MCCU’s management team, and tactics are decided, executed, and managed by the collective credit union staff.
How will it be used?	To ensure projects, priorities, and objectives in our tactical plans are consistently leading towards an agreed upon outcome. The executive team will use it to determine focus and goals for the teams. And the board will refer to it to ensure clarity of the grand strategy and overall direction of the business.
When will it change?	Because many of these components are being newly formalized for MCCU, this is a mixture of foundational components which should not change for several years into our future, coupled with shorter-term, flexible and changing strategic growth plans, with a supporting tactical plan that will certainly change as needs change, or at minimum, as part of the annual budget process.