



CASE STUDY: UNIVERSITY FEDERAL CREDIT UNION

2011 - Governance Workshop, 2013 - Governance Assessment, 2014 - Governance Progress Review, 2016 - Ongoing Governance Consulting & Training, 2017 - Governance Progress Review

University Federal Credit Union (University) engaged Quantum Governance, L3C (Quantum Governance) in a series of governance workshops and assessments from 2013 to 2017. During that time, University's Board and CEO worked in constructive partnership to clarify their governance approach and strengthen governance and strategic planning practices.

Our firm's assessments for University built on our proven methodology to include 1) a customized online survey, 2) a series of telephone interviews with the Board and Senior Leadership Team members and 3) a review of governance documents and policies. The initial assessment in 2013 revealed that some of the perceptions or understanding around the credit union's governance held by Board and the Senior Leadership Team had become misaligned over the years.

With Quantum Governance's encouragement in 2016, University was able to achieve a higher degree of Board and senior management alignment and ultimately undertake a thoughtful review and assessment of University's strategic vision, mission and overall strategic plan. Through the credit union's commitment and hard work, the Board and senior management team were able to come to a consensus on their strategic vision and plan for University's FCU's future path.