Small CU Toolkit Notes for Website Changes

1. Placeholder video- talk about the small CU initiative and possibly have Samantha speak as well

-Can you send us this video

1. Training videos- section into tiers

* Remove “Free Training” and leave BSA as a stand alone but resize as 3x3. Take the BSA resources to the bottom of the page and add under additional resources.
* Row of 3- Cybersecurity, Fair Lending, Robbery
* Row of 3- Elder, Board Responsibilities, Supervisory Committee
* Row of 3- CU Financials, Member Svc, Interest Rate Risk

1. Change thumbnails of training videos to their titles.
2. InfoSight Section: InfoSight logo should be hyperlink

* Placeholder video-Add Compliance InfoSight video here (Alisha to send link)
* Change “button” to “Access Now” – Link to open in new tab

1. PolicyPro Section: Add logo and make a hyperlink

* Reword bullet to indicate necessary customization
* Add PolicyPro video?
* Bold “IF” – “f” should be lowercase
* Customize Model Policies- (think of how to reword or insert disclaimer)
* “Publish Policies For Your Staff. Board, And Examiners” -replace . with a , after staff. Also, line up “Examiners” with the rest of the text.
* Wrap text in the bottom section to fix the big spacing
* Change “button” to “Register Now”

1. SAS Funds

* Add , in $1000 = $1,000
* Change product and/or service to “product, service and/or event including:”
* All links to open in new tab
* LSCU Education and Training Events opens to Chapter Calendar page, needs to open here: <https://lscu.coop/education/index.php>
* LSCU Strategic Planning Sessions opens up to Small CU toolkit, needs to open an email to send to ME email in Outlook
* FiCEP link- please include “Southeastern Credit Union Foundation” before FiCEP
* To utilize Small CU Initiatives Account funds, simply notify your Member Engagement Consultant. – add hyperlink to email ME.
* Can we fix/change this sentence? **You may also note that the invoice is to be paid from the Small CU Initiatives Account upon receipt for events/services used. LSCU accounting staff will keep track of expenditures from your account.**
* This paragraph needs to be worded to take out specific dates/years: The Small CU Initiatives Fund was approved based on the LSCU’s 2023 budget and will be re-evaluated each year as part of our budget process. Unused funds in your account cannot be rolled over or transferred to other credit unions. This money must be used by Dec. 31, 2023 and cannot be accessed until your credit union’s 2023 LSCU dues have been paid. Credit unions who receive a dues waiver are not eligible for the Small CU Initiatives Account program. Please submit a paid invoice to the Member Engagement team for approval and reimbursement.

1. LSCU Links

* Small CU Talent Strategy Guide- move to CUNA Section
* They are not lined up – I believe they should be
  + The top of each text should line up and work down from there

(This will allow the logos to line up and not go out of the circles on some)

* + Budget Analysis- fix link
  + Delete Model CU Budget Projection Template

^ this frees up space for 1 new link, include Southeastern Credit Union Foundation Grants and link to page: [https://lscu.coop/foundation/grants.php](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Flscu.coop%2Ffoundation%2Fgrants.php&data=05%7C01%7Ckelly.yager%40lscu.coop%7C2a1ad23e7cd14f5194dd08dba2722258%7C35d0fbd62b1c432a96dbbeb69180cfc3%7C1%7C0%7C638282383330928274%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=6eXTpB1nKUEMwpvBRl7zVNiwiHQo6C7j3L7%2Fjhzxty0%3D&reserved=0)

1. CUNA
   * Swap order of “CUNA Small CU Community” and “CUNA Small CU Resources” (Resources to go first)
2. NCUA
   * Logo blurry, add hyperlink to their website
   * Cybersecrutiy- Link here instead - [Cybersecurity Resources | NCUA](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Fncua.gov%2Fregulation-supervision%2Fregulatory-compliance-resources%2Fcybersecurity-resources&data=05%7C01%7Ckelly.yager%40lscu.coop%7C2a1ad23e7cd14f5194dd08dba2722258%7C35d0fbd62b1c432a96dbbeb69180cfc3%7C1%7C0%7C638282383331084483%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=lJAPbHPUZ88Khe83Uyr%2FNwMRZGx7EqI0bZpbwb2X784%3D&reserved=0)

Other suggestions:

* + - 1. Check autoplay settings in youtube on training videos. All videos start playing when page is refreshed.
      2. Discussed “anchors”. (scroll directly to specific section)