

# Maximize your event investments. Go in with a task force and a plan.

Events are a fantastic way to connect with people who feel as passionately about the credit union difference as you do—but they cost time and money. Ever wondered if you could get more out of your investments in both?

The National Credit Union Foundation has partnered with Heartland Credit Union Charitable Foundation and the Illinois Credit Union League Foundation to help you do just that.

## 1 Set up a task force

Sending multiple people to a conference can help you gather insights from a wider variety of sessions and get multiple points of view. Some task force tips:

### Limit members

Somewhere around eight participants is a good size. This will help ensure you're hearing a range of voices without creating a group too large to manage.

### Pick a cross-section of people

Will all task force members be from your organization? Invite people across departments, roles and leadership levels. Drawing from a bigger pool of credit unions? Diversity is still the key. Both at the individual level and in terms of location, asset level and populations served.

## 2 Host a pre-event meeting

Use this meeting—which can be virtual or in-person—to choose the task force “assignment” for the upcoming event. For instance, the Heartland and Illinois task forces went to their first event ([CUFinHealth™](#)) with the goal to find one consistent theme to focus on. You can also use this meeting to get people pumped up about the event.

### Pre-conference preparation

Optimize your conference experience with preparatory research. With their focus on financial well-being, the Heartland and Illinois groups found this [Financial Well-being for All Quick Start Guide](#) to be helpful.

## 3 Attend the conference

Use the conference to network, network, network—where else can you find so many like-minded people in one place? But give task force members other “homework” to tackle too. Heartland asked its task force to write down one or two big takeaways from each session to share with the group. This helped create a level of accountability—and made it more likely great ideas would be shared and acted on.

### Assure every task force member can afford to be at the conference

Consider covering at least some of the fees associated with attendance.

### Host—and pay for—a group meal at the conference

This is a wonderful way to connect, especially for task force members who haven't met in person. It's also valuable to start the debrief process while ideas and insights are fresh.

## 4 Host a post-meeting debrief

Some people like to host the debrief ASAP. Others think it's better to put some space (2-3 weeks) between the event and the follow-up conversation. This approach can be a great complement to an at-conference debrief.

Have each member share their big takeaways with the group:

- What ideas do they want to implement at their credit union ASAP? What is one thing they're going to do to make it happen?
- What information was most eye-opening?
- What ideas do they want to implement in the next year or so? And what is one step they'll take now to make it happen?
- What information/ideas did they learn that can help the task force achieve its goals?

## 5 Schedule monthly follow-up meetings focused on action

These keep your task force to achieving your short- and long-term goals. Plus, they're fun!