OUR JOURNEY TO EXCELLENCE
A MEMBER-CENTRIC PATH

Gerry Agnes, President & CEO
SETTING THE GOAL

GREEN / BEGINNER
## How Good Are We, Really?

<table>
<thead>
<tr>
<th>Capital Annual Growth Rate</th>
<th>Members Annual Growth Rate</th>
<th>Assets Annual Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peer Group Average</td>
<td>Elevations CU</td>
<td>Peer Group Average</td>
</tr>
<tr>
<td>10%</td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>5%</td>
<td></td>
<td>5%</td>
</tr>
<tr>
<td>7%</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>

- **Capital Annual Growth Rate:**
  - Peer Group Average: 7%
  - Elevations CU: 1%

- **Members Annual Growth Rate:**
  - Peer Group Average: 3%
  - Elevations CU: 1%

- **Assets Annual Growth Rate:**
  - Peer Group Average: 9%
  - Elevations CU: 7%
core purpose

- We provide solutions for a better life.

vision

- We dominate the market while elevating the success of our members and business partners
- We have changed the way consumers and businesses bank
- We are known for the good work we do in the community
- We are sought out as THE preferred employer

BHAG Big Hairy Audacious Goal

- We will win the Malcolm Baldrige National Quality Award!

core values

integrity

- We build trust through honest and ethical actions

respect

- We treat each other with dignity and value individual differences

passionate

- We are enthusiastic in everything we do

creativity

- We foster an environment of innovation and learning

driven by excellence

- We always seek to improve and strive to exceed expectations
You Can't Handle the Truth
PERSEVERANCE

BLUE / INTERMEDIATE

It matters where you bank.
Celebrate!
LEADERSHIP SYSTEM

BLACK / ADVANCED

It matters where you bank.
Strategic Planning Process

1. Assess & Understand Ongoing
2. Set Strategic Direction March to May
3. Develop Objectives March to May
4. Define Initiatives June to July
5. Plan and Align Resources May to Sept
6. Create Financial Plan Sept to Nov
7. Goal Flow Down Dec to Jan
8. Execute Plan On-going
9. Review Performance On-going
10. Evaluate & Improve Spring & Fall

Decide, Plan, Align 3rd Tuesday
Run the Business 1st Tuesday Production 2nd Tuesday
Leadership System

Ensure Organizational Learning

Challenge the Process

Strategic Planning

Inspire a Shared Vision

Plan & Align Resources

Enable Others To Act

Create a High-Performance Environment

Membership

Workforce

Community

Encourage the Heart

Analyze & Review Performance

Deliver Results

Perform to Plan

Model The Way
KEEPING THE MOMENTUM

DOUBLE BLACK / EXPERT

It matters where you bank.
Really!

**Capital Annual Growth Rate**
- Peer Group Average
- Elevations CU

**Members Annual Growth Rate**
- Peer Group Average
- Elevations CU

**Assets Annual Growth Rate**
- Peer Group Average
- Elevations CU
Results of a Winning Strategy

- **Member Loyalty**
  - 2010-14
  - +7%

- **Employee Engagement**
  - 2009-14
  - +13%

- **Assets**
  - 2009-14
  - +56%

- **Net Worth**
  - 2009-14
  - +79%