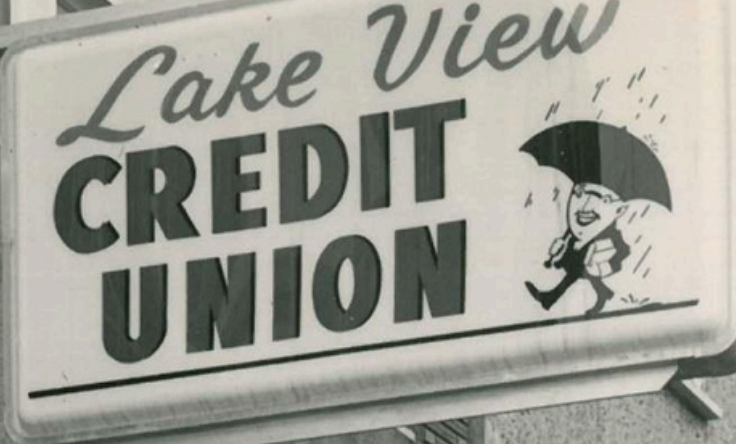




**LAKE VIEW**  
CREDIT UNION

**Growing Stronger, Together**

**2026 - 2028 Strategic Plan**



# Lake View CREDIT UNION

At Lake View Credit Union, we believe community grows when people come together with purpose, through recognition of our shared values and experiences. We understand the trust placed in us, and as we navigate change, our responsibility to our members and our employees remains at the heart of all we do.

Since 1943, we have been proud to serve the people of the Peace, helping to strengthen financial well-being, empower our neighbors and develop the communities we call home. Our values are rooted in cooperation, integrity and local service, and our vision reaches toward a future of growth, innovation, and opportunity.

We strive to stay true to our cooperative principles while providing a modern, responsive banking experience that meets our members' needs and expectations. We are our members; we are our communities. United in purpose, we'll grow stronger, together, and build a brighter tomorrow for all.





# Fresh Eyes on Renewal

## Revising Our Strategic Direction

In the summer of 2025, Lake View Credit Union's Board of Directors and newly appointed co-CEOs embarked on the development of a refreshed strategic plan to guide the organization into its next chapter. Recognizing the need to sharpen our focus amid a changing credit union landscape marked by economic uncertainty and increasing pressure to consolidate, we set out to ensure LVCU remains a strong, independent, and community-centered financial partner.

Our planning process was grounded in listening. Through member surveys, staff feedback, and an engaging all-staff session, we gathered valuable insights into what matters most to those we serve and those who serve alongside us. The strategic planning session, held at the end of September, confirmed what we heard loud and clear: our members want improved service, modernized products, and a continued commitment to personal relationships.

To meet these expectations, our renewed strategy emphasizes three priorities: enhancing the member experience, strengthening internal processes so staff can focus on meaningful connections, and maintaining the financial strength that allows us to remain an integral part of our communities. This plan reflects both our heritage and our forward-looking commitment to the communities that define Lake View Credit Union.

# Rooted in the Peace



## OUR MISSION

Growing Stronger, Together.



## OUR VISION

Our vision is to build a future defined by:

- Loyalty to cooperative values and shared purpose
- Valuing curiosity and innovation to improve experiences
- Commitment to community and strong partnerships
- Understanding and responsiveness



## OUR VALUES

**Innovative:** We embrace creativity and continuous improvement to develop new ideas, products, or processes that drive growth and adaptability.

**Resilient:** We maintain strength and flexibility to adapt to change, navigate challenges, and seize opportunities.

**Accountable:** We take ownership of actions and outcomes, fostering trust, integrity, and a results-driven culture.



# Strategic Goals

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Our strategic goals represent the long-term, big-picture objectives that will guide Lake View Credit Union in the successful execution of our strategic plan. These goals define the key areas of focus that will enable us to fulfill our mission, advance our vision, and ensure that decisions we make contribute to the lasting strength and sustainability of our Credit Union and the communities we serve.

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## Goal 1

### Elevate Member Service Excellence

Enhance the overall member experience by improving responsiveness, delivering personalized financial advice, expanding relevant product and service offerings, and fostering a culture of continuous learning and knowledge sharing.

## Goal 2

### Foster Sustainable Growth and Meaningful Collaboration

Drive long-term growth by expanding membership, increasing wallet share, and cultivating impactful partnerships that enhance member value and organizational resilience.

## Goal 3

### Maintain Financial Strength Through Strategic Investment and Risk Management

Ensure long-term financial health by optimizing deployment of net income, while proactively managing financial and strategic risks and opportunities.



# Strategic Pillars

We're committed to growing stronger together, by supporting our people, embracing innovation, working smarter, and creating meaningful, sustainable solutions that reflect our shared values and help you shape your future.

We will achieve our strategic goals through deliberate focus, resource allocation, and action in the following key areas:

## Organizational Excellence

Build a resilient and high-performing organization by fostering strong leadership, enhancing collaborative decision-making, and establishing clear structures for engagement and accountability.

## People & Culture

Transform the organizational culture by strengthening relationship-based service, investing in team development, and fostering clarity, fairness, and engagement.

## Intentional Operations

Advance organizational effectiveness by aligning operational and strategic priorities, proactively planning for the future, and leveraging internal and external partnerships to enhance efficiency and sustainability.

## Innovation

Advance digital transformation and product relevance by enhancing technology adoption, aligning digital strategies with operational needs, and continuously refining offerings to meet evolving member expectations.

## Sustainable Impact

Achieve long-term financial sustainability by applying data-driven strategies, optimizing resource allocation, and reinforcing corporate social responsibility to create meaningful value for both the organization and the community.



# Next Steps

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- co-CEOs, in collaboration with the leadership team, will establish annual operating objectives and performance benchmarks that align with Lake View Credit Union's strategic pillars and support the organization's overarching strategic goals. These targets will serve as the foundation for setting performance objectives across all levels of the organization, ensuring individual contributions align with collective outcomes.
- The Board of Directors and Executive will review and confirm these annual objectives to ensure consistency with Lake View Credit Union's mission, values, and long-term direction.
- Additional strategic priorities identified throughout the year will be initiated in response to emerging opportunities or member needs and in support of the strategic goals.
- Progress updates on key priorities and targets will be presented during Board meetings, including forward-looking discussions to guide future strategic directions.
- Each year, the Board and Executive will conduct a review of the strategic goals to assess progress, evaluate alignment with the strategic pillars, and refine direction as needed.
- Every three years, the Board and Executive will engage in a strategic planning process to reaffirm Lake View Credit Union's long-term vision, strategic pillars, and goals.

# A Strong Foundation



Lake View Credit Union's refreshed strategic plan provides the clarity and alignment needed to connect our daily work to the bigger picture. It serves as a unifying framework that strengthens communication, reinforces shared purpose, and drives meaningful execution across all levels of our organization.

This plan positions us to serve the Peace region as Lake View Credit Union for years to come. Our new mission reflects our commitment to Growing Stronger, Together; our members, our communities, and our Credit Union. Guided by our refreshed vision and values, we will make decisions and take actions that uphold the standards our members expect; standards we can measure and be accountable to.

Through this renewed direction, we will strive to deliver the best products, services, and experiences, advance digital transformation, and embrace collaboration and partnerships that enhance our impact. We will remain financially strong, adaptable, and responsive to change, continuing to provide a banking experience made in the Peace, for the Peace.