



Developing Future Leaders: Corelation’s Leadership Academy

Since our founding, Corelation has been intentional about building a company culture based around collaboration, integrity, and the belief that leaders can be found at every level of the organization. As the company continues to grow, so does the importance of being deliberate in cultivating strong, effective leaders.

Enter Corelation’s homegrown Leadership Academy. The idea for designing our own leadership development program was born out of feedback from fellow Corelation employees seeking opportunities for growth and to foster consistency across the organization.

that cover topics like how to lead high performers, setting and monitoring goals, and conducting performance evaluations.

Once our leaders graduate from the Leadership Academy, there are ongoing development opportunities and accountability to continue to build upon their skills. Most of the curriculum is delivered by internal presenters and supported by executive sponsors, which provides opportunities for further growth for Corelation’s leaders and allows us to be intentional about fostering a culture that is rooted in our core values.



Corelation’s Leadership Academy - 2024 Graduation Ceremony

To reinforce the practical application of leadership skills, attendees participate in regular Cohort Group meetings that provide a safe space to connect with peers and discuss experiences, challenges, and support one another. These small groups not only build strong relationships across various departments, but they also create a shared vision for leadership at Corelation.

“Leadership is often misunderstood as this mystical quality that only a select few can embody, but the truth is that leadership skills can be learned. We understand our Corelatives are at the core of influencing our company’s continued success, and it’s imperative that we invest in our employees,” explained Chief Operating Officer Lori Paige.

With the second class of the Leadership Academy now embarking on their development journey, we also celebrate the success of our first-ever cohort of leaders to graduate from the program in late 2024.

“The goal of Corelation’s Leadership Academy is to instill valuable insights in both our leadership and those in supervisory roles, as well as individual contributors who have a passion for our organization and exhibit leadership qualities in their roles,” noted Director of Learning & Content Management Rosie Bennett.

The program has been thoughtfully designed to expand leadership skills with practical techniques. The curriculum explores topics including emotional intelligence, navigating change, effective communication, building trust, and more. For those on management paths, there are additional courses

“Through expert-led sessions, meaningful discussions, and hands-on experiences, our first cohort of leaders gained valuable insights that will shape the future of Corelation. Our participants embraced the opportunity to learn, grow, and challenge themselves, refining the skills that will empower them to lead with confidence and vision,” explained Senior Internal Education Specialist Pat Waters. “We look forward to building on this foundation through our second Leadership Academy and beyond and continuing to inspire the next generation of leaders, at any level.”



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Note from the CEO



With the vernal equinox in our collective rearview mirror, it is official: Spring has sprung! I love this time of year for its themes of growth, rejuvenation, and endless possibility. (Not to mention daylight saving time and the longer afternoons it brings with it.) At least for me, this spring season feels like it's coalescing around one theme in particular: reconnection.

That sense of reconnection began to build when I attended the Governmental Affairs Conference in Washington DC – admittedly slightly before the official change of the season. The volume of friendly faces and quick catchups has grown steadily as Corelation has expanded its community of clients and vendor partners, and this year was the highest-energy, busiest, and most exciting GAC of my career. I've learned to appreciate the opportunity to refresh so many different relationships in such a short time – to settle some old business, jumpstart some new initiatives, and otherwise just check in and listen to others' perspectives and experiences.

Of course, strengthening professional bonds can take place well beyond the confines of a conference booth. Given my focus on collaborating in person this year, I've already had the opportunity to visit over a dozen credit union board rooms – with nary a formal agenda to be found – and the chance to get unfiltered feedback directly from the source has been so valuable that I'm lining up another dozen for the months to come.

And last but certainly not least, there is nothing more gratifying than spending time with my fellow Corelatives. We recently hosted our entire organization in San Diego for our "Anchors Away Staff Week" – a chance to bring everyone back to headquarters and work shoulder to shoulder like in the good old days. To see the team in action, to be up close to their collective energy, teamwork, and genuine care for our partners was nothing short of invigorating.

And so I invite you to harness the atmosphere of spring like I have, to make the time investment necessary to get away from email and Teams and instead to reconnect with others from your cohort in person. (If you're not sure where to start, may I humbly suggest our 14th Annual Client Conference here in San Diego on May 14-16. 😊) Wherever or whenever it may be, I promise the returns will be worth it.

See you soon! – Rob Landis, CEO, Corelation Inc.

Employee Spotlight: Rudy Rullan, Hardware Specialist II

Rudy Rullan's passion for technology began at an early age. Growing up in San Diego as a proud "Navy brat," he attended Point Loma High School, where he spent time working in the computer lab. That curiosity ignited a lifelong career in technology, ultimately making him a vital member of Corelation's hardware team.

Rudy earned a double major in Business and Information Systems from San Diego State University, which launched a global career. He spent eight years in the Philippines working on e-government projects, then joined LG Electronics before returning to San Diego to continue his IT career.

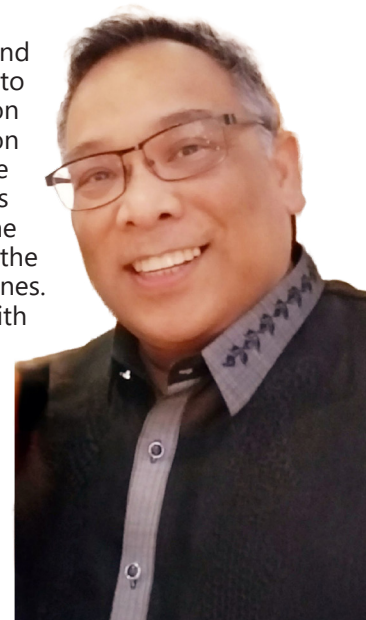
In 2017, he applied for a Business Analyst role at Corelation, but his hardware expertise led him to a better-fitting position. Since then, he has been instrumental in the hardware team, combining his technical skills with a deep understanding of system interactions.

Rudy's role as a Hardware Specialist is constantly evolving. He focuses on assessing innovative solutions, collaborating with UI and development teams, and staying ahead of industry trends. He played a significant role in Corelation's Linux Migration and is leading the effort to explore alternative virtualization solutions. His adaptability and leadership in cutting-edge advancements make him a key asset to the company.

Rudy enjoys the freedom to discover new technologies and share knowledge as the most senior member of his seven-person team. Though learning the credit union industry was initially a challenge, introducing clients to KeyStone's technology has become one of his favorite aspects of the job. He also values Corelation's open, collaborative culture, where cross-departmental teamwork drives innovation and problem-solving.

Outside of work, Rudy keeps busy and active. A former athlete, he continues to compete in badminton and serves on the board of the San Diego Badminton Organization. He and his wife share a passion for travel, with Hawaii as a favorite destination. Known as the foodie of his group, he's always on the hunt for new restaurants and cuisines. At home, he enjoys spending time with his beloved mini poodle, Coco, his dedicated "House Supervisor."

Driven by curiosity and innovation, Rudy plays a pivotal role in shaping KeyStone's future. Thank you, Rudy, for all that you do for Corelation and our credit union partners! 🍷



Tips & Tricks: Building Strong Vendor Relationships

How to Prepare for the Corelation Client Conference & Vendor Showcase

KeyStone’s vendor-agnostic platform offers unmatched flexibility, enabling seamless integration with any vendor through the KeyBridge open API. With unlimited third-party integrations and a growing network of top industry partners, KeyStone empowers credit unions to optimize operations, enhance member experiences, and drive innovation.

Attending the Corelation Client Conference provides a valuable opportunity to connect with industry vendors and explore solutions tailored to your credit union’s needs. To maximize your time, it’s essential to have a game plan for vendor discussions.

Before the conference, review third-party agreements for upcoming renewals and gather each department’s project plans for the year. Take note of key vendor needs and compare them with the list of attending vendors. To make the most of your time, focus on [Corelation’s Preferred Partners](#).

Our Preferred Partners are thoroughly vetted through feedback from our mutual clients and our staff to establish strategic partnerships that benefit our clients. When vendors integrate with KeyStone, they have the option to become KeyBridge Certified with additional testing through our certification program to ensure the integration is functioning correctly and efficiently. Vendors can integrate through Batch, Single Sign-On (SSO), or Real-Time, with SSO and Real-Time preferred for seamless connectivity, efficiency,

and a better member experience. KeyBridge Certified partners fully optimize their integrations, maximizing KeyStone’s capabilities.

After compiling your projects and expiring contracts, contact all departments to gather any unresolved vendor support tickets. The conference is a great opportunity to address these in person. If you need help connecting, the Corelation Vendor Relations Team or your Client Relationship Manager can assist with introductions.

With nearly 100 vendors attending the Corelation Client Conference this year, this is the ideal time to evaluate both current and potential partners, discuss integration strategies, and explore new functionalities. The Vendor Speed Rounds offer a quick and efficient way to hear from multiple vendors, with each having only 7 minutes to pitch their product.

KeyStone’s open API offers unlimited integration possibilities, ensuring seamless connectivity across all tables, fields, and transactions. Assess whether your vendors are maximizing these capabilities to amplify efficiency, innovation, and flexibility. Strong vendor relationships drive operational success and improve member experience. With KeyStone’s expanding network of industry-leading partners, you have the freedom to choose the best solutions for your credit union. The choice is always yours. ▣



Upcoming Training & Seminars

For the full list of upcoming Corelation training offerings and to register for courses, [click here](#). *(Confluence access required)*

Fees

April 16th
12-1pm PST

Confluence Overview

May 1st
12-1pm PST

Operational Enhancements

June 11th
12-1pm PST

Back-Office Technical Training

KeyBridge Training
April 15-16 • June 10-11

Beginner Reports Training
April 8-10 • June 24-26

Advanced Reports Training
April 29-May 1

UI Scripting Training
April 22-24 • May 27-29

Batch Scripting Training
April 1-3 • May 6-8

KeyStone Server Administration
June 10-11

Ad-Hoc Reporting in KeyStone
May 5

Interested in Custom Training?

Our Technical Training & Education Services both offer custom training, available virtually or in-person!

Custom Technical Training

Choose a targeted list of technical topics from our available courses to determine your curriculum.

[Learn more](#) *(Confluence access required)*

Customized Training with Education Services

Select from our catalog of prepackaged sessions or let us create something unique for your credit union.

[Learn more](#) *(Confluence access required)*

Corelation Client News & Success



Congratulations to Tanya Chavez, Vice President of Technology at Sunward Federal Credit Union, who has been recognized as a 2025 Women in Tech Award honoree! For 17 years, these awards have honored outstanding women who are shaping New Mexico's tech industry. This year's recipients are breaking barriers, driving innovation, and paving the way for future generations. Their achievements were celebrated on March 13 at the National Hispanic Cultural Center. [Check out the recognition here.](#)



Desert Financial Credit Union and Desert Financial Foundation announced a record-breaking \$2.25 million donation to Phoenix Children's Hospital's 1 Darn Cool School! This fully accredited K-12 program provides hospitalized children with classroom or bedside instruction. Since the inception of the partnership in 1997, Desert Financial has raised over \$13.2 million, with a goal of reaching \$5 million more by 2029. These funds support teachers, technology, and facilities, ensuring a lasting impact on the community. [Watch the video here](#) and [read the full story here](#) to learn more about this incredible initiative!



Preferred Partner Spotlight: MEA Financial

The Advantage of Offering Treasury Services for Community Credit Unions

By Ed Rhea, President/CEO, MEA Financial • For a full list of Corelation partners, [click here.](#)

Community credit unions have always been recognized for their commitment to member service, local engagement, and personalized financial products. As small and medium-sized businesses grow, credit unions must adapt to their evolving needs, particularly concerning treasury services. Offering these services is not just an opportunity for revenue generation; it is essential for fostering stronger relationships with business members, supporting local economies and offering businesses essential services at a better price point than banks. By capitalizing on these factors, credit unions can realize a competitive advantage with their local business community.

Customary Treasury Service Options

Treasury services encompass a range of financial services that manage a business's cash flow, optimize liquidity, move money, pay invoices and minimize financial risk. Common treasury services include cash management, payment processing, and fraud protection. For credit unions, providing these services can enhance the value proposition for business members.

Online & Mobile Cash Management

Effective cash management is crucial for any business, especially in today's fast-paced environment. Credit unions can provide tailored cash management solutions that help businesses manage their cash flow efficiently. These may include:

- **Business Checking Accounts:** Designed for higher transaction volumes to help businesses manage day-to-day operations effectively.
- **Automated Clearing House Services:** ACH services facilitate electronic funds transfers for payroll, vendor payments, and customer collections; streamlining operations, reducing transactional friction.

- **Wire Transfer Services:** Fast, secure transfer of funds electronically to consumers and businesses. Flexible way to move funds quickly.
- **ACH & Transaction Monitoring:** ACH fraud is rising, and monitoring this activity via daily alerts is a key to mitigating this risk.
- **Positive Pay Fraud Prevention:** Automated review of cleared items, both checks and ACH transactions, allowing for automated detection and business review of items cleared but not issued.
- **Mobile Management Tools:** Mobile platforms that mirror the features and functions offered online allows businesses to monitor their finances in real-time, with access to balances, transactions, etc.

By providing robust cash management services, credit unions can attract more business members by empowering businesses to make informed financial decisions, move funds quickly, and optimize their liquidity while mitigating risk through fraud prevention.

MEA offers technology to meet the needs of a business member outlined above. Through MEA's full-service digital banking solution, UniFI, dozens of financial institutions, including credit unions on KeyStone, offer business Treasury Services that compete and win versus traditional commercial banks. UniFI Digital Banking is fully integrated with KeyStone through KeyBridge for both retail and treasury management digital banking. MEA has partnered with Corelation to complete KeyBridge Integration Certification that is expected to be completed early in the second quarter of 2025. Please reach out to Edward W Rhea, President/CEO at 417-235-5144 x1138 or by email at erhea@meafinancial.com to learn more or stop by the MEA booth at the Corelation Client Conference in May.



Corelation's 14th Annual Client Conference



Welcome, New Clients

(Through March 1, 2025)

Meritus Credit Union
\$249 million in assets
Lafayette, LA



Aspen Federal Credit Union
\$145 million in assets
Rapid City, SD



Security First Federal Credit Union
\$506 million in assets
McAllen, TX



Financial Plus Credit Union
\$528 million in assets
Ottawa, IL



Greater Iowa Credit Union
\$653 million in assets
Ames, IA



ServU Federal Credit Union
\$473 million in assets
Painted Post, NY



Bossier Federal Credit Union
\$255 million in assets
Bossier City, LA



OUCU Financial Credit Union
\$513 million in assets
Athens, OH



Premier Financial Credit Union
\$129 million in assets
New Holstein, WI



United Credit Union
\$277 million in assets
Mexico, MO



Nymeo Federal Credit Union
\$363 million in assets
Frederick, MD



GECU Federal Credit Union
\$4.4 billion in assets
El Paso, TX



Conversiongram



XCEL FCU Pause for a Pic



Eastex CU Conversion Team



Disney Theme Conversion at XCEL FCU



F&A FCU in Top Core Conversion Training



Welcome Glendale Area Schools CU



Glendale Area Schools CU Mascot



All Smiles at XCEL Federal Credit Union



Glendale Area Schools Credit Union Team



Eastex Credit Union Squad



F&A FCU has the Top Core



F&A FCU Ready to Convert to KeyStone



Genisys CU Hard at Work



Genisys CU Conversion Turkeys

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