



Introduction

CUFA has a comprehensive range of programs that:

- Add value to credit union's Australian activities
- Focus on community advocacy and education
- Support credit union capacity to deliver effective community support activities.

With the support of Cuscal and Abacus, CUFA is able to deliver many programs to credit unions either free of charge or on a cost recovery basis. Each credit union is encouraged to review its engagement with CUFA and maximise opportunities that exist.

Range of available programs by primary focus:

Awareness

- Environmental Roundtable
- Cambodian Credit Union Education Program

Capacity

- Cambodian Leadership Challenge
- Development Education

Development

- Financial Literacy Initiative
- Pacific Technical Congress

Engagement

- Indigenous Reconciliation
- Supporters Marketing Kit
- CSR Toolkit
- Credit Union Member Donation (Pilot)
- Emergency Relief Fund

Representation

- Mutual Community Report

Following are brief descriptions of CUFA programs with appropriate CUFA contacts for further information or support.

Awareness

Environmental Roundtable

CUFA will be hosting the Credit Union Environmental Roundtable in Sydney on 24 July 2008.

The focus of the Environmental Roundtable is the business case for sustainability. CEO's, CFO's and executive management from credit unions across Australia are invited to the industry event, which will be led by convenors Tony Innes, Deputy CEO of Savings and Loans and Rowan Dowland, Group Manager Marketing and Development of mecu.

The Environmental Roundtable is an excellent opportunity to discover key issues and opportunities pertaining to the business case for being green, and how credit unions can engage in environmental practises, driven not only by ethical reasoning but by financial sustainability.

Project Status: **Active**

Details: <http://cufa.com.au/introduction/CreditUnions/Environment/index.jsp>

Contact: **Claudine Chicheportiche**
Email: cchicheportiche@cuscal.com.au Phone: 02 8299 9032

Awareness

Cambodian Credit Union Education Program

The program gives a first hand taste of CUFA development programs while in Cambodia, and provides insights into the challenges and major issues impacting the financial cooperatives in Cambodia. CUFA's program takes participants through a variety of Cambodian financial institutions and cooperatives enabling up to 15 CEO's and Directors gain a sense how credit unions are evolving in Cambodia.

Project Status: **Active: Next program dates to be confirmed.**

Details: <http://cufa.com.au/introduction/Projects/EducationProgram/index.jsp>

Contact: **Carla Elbourne**
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Capacity

Cambodian Leadership Challenge

The CUFA Cambodian Leadership Challenge is an exciting program with a range of activities designed to take people out of their comfort zones. It offers a unique insight into Cambodian culture allowing for an intimate connection with Cambodian communities and their credit union movement. As a leadership development and team building program, the CUFA Cambodian Leadership Challenge is second to none as it brings people together in an interdependent, testing and rewarding experience, whilst providing participants with an enjoyable, inspirational and unforgettable learning and bonding experience.

Project Status: **Active**

Details: <http://cufa.com.au/introduction/CreditUnions/MarketingKit/index.jsp>

Program Contact: **Claudine Chicheportiche**
Email: cchicheportiche@cuscal.com.au Phone: 02 8299 9032

Technical Contact: **Philip Lambert**
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Capacity

Development Education

The DE program is professional, six day training and development education program that communicates the vital importance and function of credit unions.

DE caters for all credit union staff and participants will gain exceptional results in personal development, credit union awareness, greater understanding of the credit union industry and its relationship and value to the community.

Uniting participants from Australia, New Zealand, the Asia-Pacific region and the USA, the DE engages attendees a variety of training and development workshops, presentations and activities that leads to successful outcomes for the individual, the credit union, and the greater community.

Project Status: **Active. Next program dates to be confirmed.**

Details: <http://cufa.com.au/introduction/CreditUnions/DevelopmentEducation/index.jsp>

Contact: **Claudine Chicheportiche**
Email: cchicheportiche@cuscal.com.au Phone: 02 8299 9032

Development

Financial Literacy Initiative

The Financial Literacy initiative is an unbranded web based tool for credit unions to offer to their members. Featuring lifestyle relevant material and tools, it aims to capture the user's attention, encourage them to identify with the material and gain insights into situations where they can take positive actions when dealing with financial activities.

Currently available are four Child Series and a Youth Series.

This is an excellent opportunity to provide socially responsible personal financial awareness tools and information to members and their community. The series are easy to link to from the credit union's website.

Project Status: **Active**

Details: <http://cufa.com.au/introduction/CreditUnions/FinancialLiteracy/index.jsp>

Contact: **Philip Lambert**
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Development

Pacific Technical Congress

The Pacific Credit Union Technical Congress will be held in Nadi, Fiji - from September 29 – October 3 2008. The purpose of the congress is to bring together credit unions movements, their leagues, federations and government regulators from developing and developed nations in the Pacific region to share information and learn from each other. Running concurrent with the Pacific Credit Union Technical Congress is WOCCU's Manager Certification Program.

Project Status: **Active**

Details: <http://cufa.com.au/introduction/Projects/PacificCongress/index.jsp>

Contact: **Carla Elbourne**
Email: celbourne@cuscal.com.au Phone: 02 8299 9103

Engagement **Indigenous Reconciliation**

The CUFA **Reconciliation Action Plan** (RAP), approved by Reconciliation Australia on April 15 2008, aims to address issues impacting Indigenous Australians to build respect, relationships and opportunity - through direct inputs and advocacy.

CUFA will **directly** provide an on-line Indigenous Financial Literacy resource, for use by Australian credit unions and appropriate organisations, to provide to their indigenous staff, membership and communities.

CUFA **advocates** for credit unions to consider strategic or CSR opportunities to engage with indigenous stakeholder organisations or directly with communities in their area of operations, to build respect, relationships and opportunity.

Project Status: **In Development**

Details: <http://cufa.com.au/introduction/Projects/Reconciliation/index.jsp>

Contact: **Philip Lambert**
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Engagement **Supporters Marketing Kit**

The CUFA Supporters Marketing Kit assists credit unions to communicate the positive impact of their financial support of CUFA to their members and general community.

The kit enables credit unions to promote their support to both internal and external stakeholders and build ownership of the credit union's participation in CUFA's activities. The communication is a combination of display posters and digital media that will offers simple messages to stakeholders, for use in communications to members and staff.

Project Status: **Active**

Details: <http://cufa.com.au/introduction/CreditUnions/MarketingKit/index.jsp>

Contact: **Philip Lambert**
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Engagement **CSR Toolkit**

Credit Union Foundation Australia (CUFA) developed the Corporate Social Responsibility (CSR) Toolkit specifically for credit unions to implement, frame and report their sustainability strategies and activities.

Sustainability reporting adds significant value to the positioning statement of each credit union - linking into the competitive attributes of community focus, social responsibility and mutual interest. There are sound business reasons to being a responsible corporate citizen.

The educational components of the CSR Toolkit enables users to access credit union specific information - and resources such as case studies and business cases enable users to share experiences and exchange ideas.

Project Status: **Active**

Details: <http://cufa.com.au/introduction/CreditUnions/CSRToolkit/index.jsp>

Contact: **Philip Lambert**
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Engagement **Credit Union Member Donation (Pilot)**

Credit Union Foundation Australia (CUFA) is piloting a credit union member donor program. The program aims to engage with credit union members, who voluntarily contribute via direct debits from their credit union accounts, while building brand profile for credit unions demonstrating the credit union difference.

This joint project is an innovative way for credit unions to encourage member engagement in CUFA's international development initiatives. Together, CUFA, Australian credit unions and their members are building a larger gateway to help alleviate poverty in the Asia-Pacific region..

Project Status: **Pilot**

Details: Refer to contact below at this stage

Contact: **Carla Elbourne**
Email: celbourne@cuscal.com.au Phone: 02 8299 9103

Technical Contact: **Philip Lambert**
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Engagement **Emergency Relief Fund**

CUFA has set up a trust for a disaster relief fund that can be activated when the need arises within Australia. Credit unions can now collect under the "Credit Union Relief Fund". Over the coming months a criteria for enacting the fund will be drafted for comment and an automated web based process is currently being developed to make collecting funds as simple as possible.

The Emergency Fund concept is a disaster relief fund-raising channel - for credit unions to deploy at short notice once a significant destructive event has occurred in Australia.

This will be an efficient way for the Australian Credit Union Movement to leverage it's market reach as an industry during crisis times for the aid benefit of others, while retaining brand identity of a campaign in co-operation with CUFA.

Project Status: **In Development**

Details: <http://cufa.com.au/introduction/CreditUnions/EmergencyFund/index.jsp>

Technical Contact: Philip Lambert
Email: plambert@cuscal.com.au Phone: 02 8299 9031

Representation **Mutual Community Report**

The Corporate Social Responsibility (CSR) Toolkit developed for credit unions by Credit Union Foundation Australia (CUFA) - potentially represents the sector's collective effort through aggregation of data - which could have significant marketing and political effect.

CUFA endeavours to collect Australian credit unions' community investment activity data to:

- Compare performance of the sector with that other ADI's and industries;
- Affirm the reality of mutuality; providing material data back to members for their marketing use;
- Enable Abacus Public Affairs political lobbying and marketing purposes.

Project Status: **Active - 2008 reporting season August 2008.**

Details: <http://www.cufa.com.au/introduction/CreditUnions/MutualCommunity/index.jsp>

Contact: **Philip Lambert**
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