



CREDIT Union Lines

AIL CANADA

TOOLS AND RESOURCES FOR CREDIT UNIONS • SEPTEMBER 2009

THE BLUE PAPER

of the Month

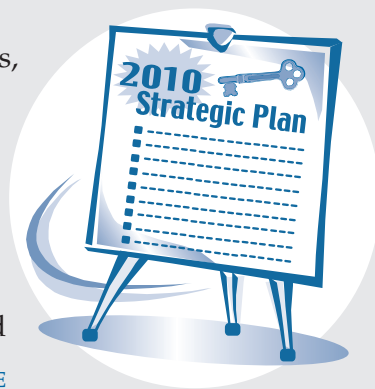
“The Nine Key Elements to Analyze Before You Make Your Strategic Plan for 2010”

The recent financial crisis/recession has led to a multitude of changes in the way Credit Unions do business.

As we look forward to 2010, Credit Unions realize that next year will not be “business as usual.” And as strategic planning time approaches, it becomes obvious that our plans for the coming year will likewise have to be tuned to these critical times.

CU executives and strategic planners seem to be in agreement that, in addition to the usual SWOTs (strengths, weaknesses, opportunities, and threats) there are nine other elements that should be considered before finalizing your strategic plan for 2010.

This month’s AIL *Blue Paper* is titled “**THE NINE KEY ELEMENTS TO ANALYZE BEFORE YOU MAKE YOUR STRATEGIC PLAN FOR 2010.**” The recession and present financial crisis will require different rules this year. ♦



For your complimentary copy, just contact your AIL representative or call the AIL Credit Union Center at 800-278-6661.

Trends and Topics

CREDIT UNIONS RANK FIRST IN CUSTOMER SERVICE

For the fifth year in a row, an independent survey of thousands of Canadians has shown that credit unions rank first in overall quality of customer service among all financial institutions.



“We are pleased to see that Canadians continue to rate their experience at credit unions very highly,” said David Phillips, President and CEO of Credit Union Central of Canada (Canadian Central).

“Credit unions have more than five million members across the country and do an excellent job of providing the service people want,” Phillips said. “This is our core mission, meeting the needs of our members.”

Global market research firm Synovate announced its 2009 Best Banking Awards, which are derived from its Customer Service Index. It found credit unions ranked ahead of all banks and other financial institutions in the following categories:

- Overall Customer Service Excellence
- Values My Business
- Branch Service Excellence

continued on page 2

CU Trends and Topics

continued from front page

Credit unions also tied for first in the following categories:

- Financial Planning and Advice
- Recommend to Friends and Family
- Telephone Banking Excellence

Two Canadians Honored at WOCCU Conference

Two Canadians received special honors at the recent World Council of Credit Unions (WOCCU) Annual Conference in Barcelona.

Jeff Rout, a Senior Financial Advisor at Servus Credit Union in Edmonton, was selected as one of five WYCUP (Young Credit Union People) Award winners from around the world. Each winner will receive an all-expense paid trip to The 1 Credit Union Conference, a combined event held jointly by WOCCU



and CUNA & Affiliates, the U.S. credit union trade association and WOCCU member, in Las Vegas in July 2010.

Also honored at the conference was Wayne Nygren, retired CEO of Credit Union Central of British Columbia, who was one of two people to receive WOCCU's Distinguished Service Award. Nygren was a member of the boards of both Canadian Central and WOCCU. His service included development activities in Hungary, Thailand, and Latin America. Other Canadians participating in this year's WYCUP program were: Marty von Wuthenau, Central 1 Credit Union; Corey Bowes, OMISTA Credit Union (New Brunswick); and Devin Selte, Servus Credit Union. ♦

Records Smashed at 2009 Credit Union Atlantic Lung Run

There were a slew of record-breaking performances at the 3rd annual Credit Union Atlantic Lung Run on August 9. Three records were smashed before the run even began. The 2009 Credit Union Atlantic Lung Run brought 345 participants to Pier 21 to experience Halifax's flattest, fastest 5K course. This surpassed the previous record of 248 participants.



Serving the Community



The next new record was in fundraising. Participants in this year's Lung Run raised more than \$28,000 to support Lung Association of Nova Scotia's services and programs, including Camp Treasure Chest. Leading the way was team CUA Crusaders (Credit Union Atlantic), which raised more than \$8,300. This surpassed the previous record of \$5,400, set in 2008 by HiringSmart.ca.

On the course, Halifax's Robert Kitz ran the first sub 15 minute 5K on Nova Scotia roads since 1991. His time of 14 minutes and 54 seconds broke last year's record of 15:20. ♦



**Comments?
Suggestions?
Questions?**

**Call the Credit Union Center Hotline:
1-800-278-6661**