

MEDIA RELEASE

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Aldergrove Credit Union, G&F Financial Group & Sunshine Coast Credit Union Pilot Credit Union Excellence Dialogue

With the goal of taking collaboration to new heights, the inaugural Credit Union Excellence Dialogue held on May 27th brought together the management teams and board of directors of Aldergrove Credit Union, G&F Financial Group and Sunshine Coast Credit Union. The three BC credit unions kicked off their respective annual strategic planning with a shared day of networking and thought leadership that attracted over 50 attendees.

The day began with introductions and networking, followed by presentations from four innovative speakers with each one concluding in small group dialogue and a collective sharing of insights.

“Credit unions are well-known for their co-operation among leadership and management teams; we regularly pool our ideas, build products together and even share talent,” commented Gus K. Hartl, CEO at Aldergrove Credit Union. “We envisioned that the benefits gained from collaboration could be extended to the director level, the very people who are representing our members. This day provided our directors and leaders with the opportunity to make new connections, discuss similar challenges, and consider new perspectives and opportunities in preparation for our own individual strategic planning work.”

Four distinctive thought leaders from a variety of industries were carefully chosen to present to the group via Skype™ throughout the day. “Our facilitator Charles Holmes connected us with a unique speaker panel and technology allowed us to access these top speakers in a very cost-effective way,” said Bill Kiss and Jeff Shewfelt, Co-CEOs, G&F Financial Group. “Collaboration was a common theme that echoed through the day; presenters spoke about the benefits of connecting with those we don’t perceive as like-minded, the significance of vision clarity and how establishing a baseline of trust allows us to move more quickly.”

The financial services industry is more dynamic than ever, and that brings both opportunity and challenges to individual credit unions and the system alike. “This session was another way we could experiment with collaboration,” said Shelley McDade, CEO Sunshine Coast Credit Union. “I believe that the reason this pilot was successful is two-fold. First, there’s always great learning that comes from varied and diverse perspectives. And second, despite any differences, we have a shared commitment that credit union sustainability is critical to our industry, to our members and to our communities.”



The goal of this year's Excellence Dialogue was to introduce insights from leaders in a variety of sectors who have extensive experience in leadership and change. The content and resulting dialogue was extremely rich; speakers and four key learnings from the day included:

Nicole Boyer, Adaptive Edge

One of the most critical sustainable competitive advantages is to be able to learn faster than your competition and adapt quickly, resulting in an expedited learning cycle. *"Part of this is collaborating with, or at least being curious of those who may not be completely aligned with you."*

Al Etmanski, Community Organizer

There are three types of innovators required to effect change: Disruptive, Bridging and Receptive. *"Lasting impact requires deepening relationships with friends and allies as well as strangers and adversaries."*

Karen Radford, Enbridge Inc.

Change is required if you do not wish to default to a future in which you've had no say. Be sure to very clearly define the future vision for all stakeholders. *"When I say we are going to the cottage or cabin, the picture in my mind may be completely different than yours. Begin by painting the picture together."*

Jaya Kumar, Marketing Evangelist

Trust is the emollient that can bring a multitude of people together, but it doesn't occur naturally and it must be nurtured. *"A culture based on trust increases the speed of which you can run."*

Participants of this collaborative session found great value in sharing insights with other like-minded credit unions and encourage all Canadian credit unions to expand their conversations to explore the opportunities within the co-operative system. Plans for the second annual Credit Union Excellence Dialogue are underway. For information related to this or general information about the inaugural session, please contact:

Aldergrove Credit Union
Gus K. Hartl, CEO
ghartl@aldergrovecu.ca
604.857.6461

G&F Financial Group
Bill Kiss, Co-CEO
bkiss@gffg.com
604.517.5150

G&F Financial Group
Jeff Shewfelt, Co-CEO
jshewfelt@gffg.com
604.517.5199

Sunshine Coast Credit Union
Shelley McDade, CEO
smcdade@sunshineccu.net
604.886.4462



About Aldergrove Credit Union

Aldergrove Credit Union is a financial service cooperative located in the heart of the Fraser Valley. We proudly offer personal and commercial banking, insurance and financial planning solutions to our members and clients in the communities of Langley, Aldergrove, Abbotsford and Mission. The credit union has over \$750 million assets under administration, approximately 120 staff, 18,000 members, and operates six branches, three insurance offices, and three financial planning offices. For more information, visit www.aldergrovecu.ca.

About G&F Financial Group

With over 29,000 members, 13 locations and \$1.6 billion in total assets under administration, G&F Financial Group proudly provides a full range of personal and business banking solutions to our credit union members. With a passion for educating and empowering others to achieve their financial goals, we focus on providing advice tailored uniquely for each member and have supported members and invested in our local communities for over 75 years. Our commitment to investing in others has been recognized by BC's Top Employers, United Way and the Burnaby Board of Trade - we continue to be inspired to make a positive impact in the lives of our members, employees, and communities. www.gffg.com.

About Sunshine Coast Credit Union

With over \$500 million in assets, Sunshine Coast Credit Union is a full-service co-operative financial institution serving over 16,000 members through three locations and mobile services. Employing close to 85 people, SCCU was a recent recipient of CoachingWise, an International Coach Federation designation. Neighbors helping neighbors is how we began almost 75 years ago, a vision that remains true today: Together, we enrich lives & community on the Sunshine Coast. Learn more at www.sunshineccu.com/OurStory.

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