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CCUA
Canadian Credit Union Association

ACCF
Association canadienne des
coopératives financières

*ESG & Social
Purpose Toolkit*
FOR CANADIAN CREDIT UNIONS



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SOCIAL PURPOSE ROADMAP

To begin or advance on your social purpose journey there are a set of steps most organizations follow, as set out in the chart below. The following [link](#) reviews these steps in more detail.



*Credit Union
ESG & Social Purpose
Self-Assessment*



GOVERNANCE

3.0 SOCIAL PURPOSE	POINTS
"It's why we exist."	0
We have defined our social purpose, our core reason for being, and bring it to life through everything we do. Our purpose shapes and informs how we contribute to a better world, including and beyond our members.	0
Our profits enable and result from our social purpose; we don't pursue profits at the expense of people and the environment.	0
We harness our resources, assets, relationships, influence, and reach to advance our social purpose.	0
The Board approved our social purpose and monitors its execution. Our social purpose is a long-term aspiration that sets out where we want to take a stand, be an advocate, and benefit members and society.	0

MEMBERS

3.0 SOCIAL PURPOSE	POINTS
We provide hardship awareness education to staff so they can recognize and address member financial hardship; our employee performance evaluations incentivize and reward staff for proactively supporting member financial health.	0
We have adopted and are implementing a system and strategy for member financial health and resilience, with goals, targets, and metrics.	0
We educate members on the co-operative, local, sustainability and purpose economy so they understand where their money goes and the interplay between the local economy, the environment, and society and how it affects their region/community.	0

COMMUNITIES

3.0 SOCIAL PURPOSE	POINTS
We use both financial and non-financial resources and our core competencies, products and services, assets, skills, and expertise to advance our social purpose.	0
We collaborate and co-create with stakeholders on innovations that address systemic ESG issues faced by our members and communities.	0
We engage with cross-sector partners to develop new social purpose markets.	0
We engage in industry and multi-stakeholder collaborations, mobilize external funding (e.g. public, government, foundation) and find synergies with business partners and members to advance our social purpose.	0

EMPLOYEES

3.0 SOCIAL PURPOSE	POINTS
Our employee volunteer program advances our social purpose and is linked to career development and performance plans.	0
Our employee engagement survey and internal audits reveal that social purpose is a flourishing aspect of our culture.	0
Our employees understand, support and are equipped to advance our social purpose and know how it applies to their role; they feel responsible and empowered to integrate social purpose in their daily work activities.	0