

The Social Impact Management Institute (SIMI) evolved from a need identified when the National Credit Union Foundation interviewed credit union leaders from around the country about their perceptions of the Credit Union Development Education (DE) Program. While there was a call to increase participation in the DE Program, another need emerged. The SIMI is designed to address this need. Credit union leaders agreed there is a need for leadership training that:

- **Empowers** current and future credit union leaders (both staff and boards) with access to thought leadership, information, and tools to capitalize on the unique role that credit unions and other cooperative institutions play in society;
- **Demonstrates** how that role provides a real social value and a competitive advantage that can be embraced by current members, new members, and new markets;
- **Connects** credit unions to learn not only from each others' success, but also the success of other industries and institutions that have created benefits for themselves and their communities by taking a proactive stance on social responsibility.

The National Credit Union Foundation is a non-profit, charitable foundation chartered in 1980 and is widely recognized as the national charitable arm of the U.S. credit union movement. Having both the knowledge and resources necessary to undertake national programming, the Foundation serves as the financial intermediary between credit unions and federal agencies; and funds innovative initiatives in support of financial education, transaction services, savings, credit, and homeownership.

Specifically, the Foundation supports:

- **REAL Solutions** — helping credit unions offer new services to attract low-wealth and modest means households.
- **Credit Union Development Education and Social Impact Management Institutes** — promoting credit union philosophy, cooperative principles and social responsibility.
- **Financial Education & Literacy** — including the JA's Biz Kid\$ partnership with PBS, Junior Achievement and America's credit unions.
- **www.cuaid.coop** — raising credit union disaster relief funds.
- **Federal Grants** — attracting government dollars for credit unions.
- **Innovation Grants** — encouraging innovation through grant-making.

The Foundation works day in and day out to promote consumers' financial independence through the "People Helping People" philosophy that drives the credit union movement. Please visit [www.ncuf.coop](http://www.ncuf.coop) for exciting news and more information about the Foundation.

# SOCIAL IMPACT MANAGEMENT INSTITUTE

EMPOWER • DEMONSTRATE • CONNECT



“The Social Impact Management Institute is a rare opportunity to interact with world-renowned experts in the field of social responsibility.”

STEVE DELFIN, NCUF EXECUTIVE DIRECTOR



“The content of the program really made me think in terms of ‘social impact’ — particularly about what we are currently doing vs. what we could be doing to help those of modest means. I came away inspired to do more!”

PILOT INSTITUTE ATTENDEE DANIELLE BROWN, SENIOR VP OPERATIONS, OREGON CREDIT UNION LEAGUE

## WORLD-CLASS SPEAKERS

Experts the Institute has featured include:

**John Weiser** is a globally recognized facilitator and partner in the international philanthropic firm Brody • Weiser • Burns. Weiser is the leading author of the newly published book *Untapped: Creating Value in Underserved Markets*, a practical guide for managers on how to buy from, hire from, and sell to underserved markets in ways that create benefits for corporations and communities alike.

**Lois Kitsch**, the National Program Manager for REAL Solutions with the National Credit Union Foundation, piloted the program which implements and tests new business models designed to serve new target markets. She assisted almost 70 credit unions in the innovation and implementation of product lines designed to serve new target markets, including non-members and New Americans.

**Chris Dobrzanski** is Senior Vice President of Risk Management & Operations at Vancouver City Savings Credit Union, Canada’s largest credit union and a leader in corporate social responsibility. Chris manages interest rate risk, credit lending risk, and operations risk. He has adapted innovative financial strategies to improve service and advance employees as well as contribute to the financial success of VanCity.

## WHO SHOULD ATTEND — AND WHY

The Institutes are a way to reach credit union executives, managers, and board members, and connect them to core principles and values of cooperatives and credit unions by learning from experiences of other socially responsible institutions. Many other organizations have achieved success by embracing socially responsible business practices in a manner relevant to the challenges facing credit unions. The National Credit Union Foundation believes those experiences can add value to this credit union training experience.

The Social Impact Management Institute is designed to help credit unions better serve low-wealth households and others in need of affordable financial services. Effectively serving these largely untapped but emerging markets creates a “social impact” — a convergence of community outreach and business opportunity — where credit unions can grow and prosper.

“We will continue to structure different programs to accommodate the needs of all types of credit union people. The Social Impact Management Institute is a unique new initiative to extend the core values of Development Education Programs, cooperatives and other socially responsible corporations to the next generation of credit union leaders.”

TOM DECKER, SIMI PROGRAM DIRECTOR

## INSPIRING AND INNOVATIVE



The National Credit Union Foundation’s first-ever Social Impact Management Institute was held in September 2006 at IslandWood on Bainbridge Island located across the sound from Seattle. Three dozen attendees convened to discuss cooperative values and how they can be translated into pragmatic business strategies to better serve low-income households and prospects.

As Institute Program Director Tom Decker concluded, “The feedback and reception of our first Institute was fantastic, and subsequent Social Impact Management Institutes have matched or exceeded our initial success and consistently proven to be a great experience for credit union staff and volunteers.”

## FOR MORE INFORMATION AND INSTITUTE DATES AND LOCATIONS:

**Visit:** [www.ncuf.coop](http://www.ncuf.coop)

**Email:** [ncuf@ncuf.coop](mailto:ncuf@ncuf.coop)

**Call:** 800.356.9655 x 4979

**Write:** SIMI c/o National Credit Union Foundation,  
5710 Mineral Point Road, Madison, WI 53705

