

ANNUAL ADVOCACY MEETING TOOLKIT

WHAT IS ADVOCACY?

Advocacy is any action that speaks in favor of supporting or defending.

WHY IS UNDERSTANDING CREDIT UNION ADVOCACY IMPORTANT?

Credit unions were created with a pen stroke and can be dismantled similarly. Remember that these sessions will not influence your vote but rather explain the daily political and legislative issues that credit unions face. The purpose is to show where elected officials stand on critical issues that may affect or push forward the credit union movement. Remember that advocacy is not just about politics but about protecting the industry we work for.

WHO SHOULD ATTEND THE YEARLY ADVOCACY SESSION?

Everyone who is a credit union team member should attend this yearly session. Information is fast changing, and we must all be aware of key issues impacting the credit union movement as employees.

WHY SHOULD THERE BE YEARLY ADVOCACY SESSIONS?

By having yearly advocacy sessions, we become informed and can join the efforts to stop attacks from the opposition at the state and federal levels. Remember to focus on the meaning of advocacy and credit union history. Afterward, you can introduce the Political Action Committee if you wish.

HOW MUCH SHOULD I BUDGET FOR ADVOCACY TRAINING, EITHER IN PERSON OR VIRTUAL?

If your credit union is an affiliate credit union with Cornerstone, there is no cost. You can choose whether you want virtual or in-person training.

WHO DO I CONTACT TO COME TO MY CREDIT UNION AND FACILITATE THE TRAINING?

Arkansas – Cara Tharp, ctharp@arcua.coop

Kansas – Michael Murray, mmurray@kscua.coop

Missouri – Morgan Householder, mhouseholder@cornerstoneleague.coop

Oklahoma – Sarah Warren – swarren@cornerstoneleague.coop

Texas – April Mobley, amobley@cornerstoneleague.coop



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IMPLEMENTATION TIPS AND STRATEGY

1. Training Format
 - Workshops: Interactive sessions with guest speakers from the industry.
 - Team Activities: Group discussions and role-playing scenarios to enhance understanding.
2. Regular Updates
 - Ensure that training materials are current and relevant.
 - Schedule refresher courses and update training as needed based on legislative changes.
3. Budget Items
 - Depending on the amount of interaction your credit union is interested in, you can budget for raffle items such as gift cards or create a premium basket.
 - Purchasing of coffee or snacks for the event.
 - In-person meetup: Find a venue to have your entire staff. Having it virtual is another way to save funds.

WHY SHOULD MY CREDIT UNION SPEND TIME AND RESOURCES ON A YEARLY ADVOCACY MEETING?

1. Empowerment: Team members become advocates, feeling empowered to speak on behalf of the credit union, which can enhance their job satisfaction and motivation.
2. Team Member Engagement: It fosters a culture of involvement, encouraging team members to feel more connected to the organization's mission and goals.
3. Knowledge and Skill Development: Team members gain valuable insights into advocacy issues and learn how to communicate and represent the credit union's interests effectively.

ARE THERE ANY ADVOCACY EVENTS TO LOOK OUT FOR?

1. You can attend your state's Governmental Affairs Conference and Day at the Capitol events, allowing you to connect with lawmakers on the state level.
2. You can attend the Federal GAC or Hike the Hill events in Washington, D.C. This will allow you to meet with your U.S. elected officials and federal regulators to ensure the credit union movement stays front of mind.
3. You can attend PAC fundraisers in your state or region.



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HOW CAN I STAY INFORMED?

1. Signing up for Cornerstone Action Alerts is fast and easy. All you do is text CORNERSTONE to 50457. You will receive a link to add your home address, full name, and email. This will automatically connect you to your current representatives.
2. Visit www.cornerstoneleague.coop and sign up for the newsletters for the best advocacy news.

Investing in a yearly advocacy meeting for employees enhances their engagement and skills and strengthens the credit union's overall advocacy efforts.



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