

INTRO

As a member of Access Credit Union, your views and experiences are critical, not only for ensuring your credit union meets your current needs, but also for building a better credit union for the future. We welcome the opportunity to receive feedback from our members to find out how we are doing. The information you provide is **confidential** and will be consolidated with all other survey responses and will never be individually disclosed.

The survey will take approximately 10 minutes to complete and will **close on Thursday, October 13, 2022**.

In appreciation of your opinions, you can enter for a chance to win one of eight cash prizes of \$250 at the end of the survey.

Thank you for helping us serve you better!

MERGERCU

1. Prior to the merger of Access Credit Union, Sunova Credit Union, and Noventis Credit Union on July 1, 2022, which of these financial institutions were you a member or client of?

Please select all that apply.

- ☐ Access Credit Union
- ☐ Sunova Credit Union
- ☐ Noventis Credit Union
- ☐ A financial Institution other than the ones listed above
- ☐ None of the above

TENURE

2. How long have you been a member of Access Credit Union? Please include your time as a member of a credit union that became Access Credit Union.

- ☐ Less than 1 year
- ☐ 1 - 5
- ☐ 6 - 10
- ☐ 11 - 24
- ☐ 25 years or more

AGE

3. What age category do you belong to?

- ☐ Under 18
- ☐ 18 - 24
- ☐ 25 - 34
- ☐ 35 - 49
- ☐ 50 - 65
- ☐ Over 65

INCOME

4. What is your household's TOTAL income range?

- ☐ Less than \$30,000
- ☐ \$30,000 to \$49,999
- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$100,000 or more
- ☐ I prefer not to say

BRANCH

5. Please tell us which Access Credit Union branch you use **most frequently**.

NOTE: If you **do not usually visit a branch**, please select the "I seldom or never visit a branch" option, below the branch list.

Please select one response from the list of branches below.

Select an answer... ▼

NEVER_VISIT_BRANCH

- ☐ I seldom or never visit a branch.

KIND_OF_BANKING

6. Please tell us which category best describes your relationship with Access Credit Union.

Please select all that apply.

- ☐ Personal Banking Member
- ☐ Business Banking Member

PER_BNK_HYBRID

7. Does Access Credit Union meet your overall needs with our existing personal banking products?

Please tell us why?

	Yes	No	Do not use	
Chequing accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Savings accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Investment products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Loan products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Wealth Management services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

BUS_BNK_HYBRID

7a. Does Access Credit Union meet your overall needs with our existing **business banking** products?

Please tell us why?

	Yes	No	Do not use	
Chequing accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Savings accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Investment products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Loan products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
Wealth Management services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

RATING_IMP

8. The statements below describe various service characteristics of financial institutions in general. Please rate the **importance** and your **satisfaction** with Access Credit Union's performance for each item.

Please rate your level of importance for each item.

IMPORTANCE:

	Not at all important	Generally unimportant	Neutral	Important	Very important	Not applicable to me
They fulfill their promises on time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of service is consistently high.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If I have a complaint, it is resolved quickly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am adequately informed and communicated with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff know their products and services thoroughly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I receive prompt service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They provide quality financial advice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They understand my individual financial needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They provide convenient options for service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They provide flexible solutions to meet my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They make it easy to access my funds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am greeted professionally and treated with respect.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offer investment products to meet my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have lending products that meet my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

RATING_SAT

Please your level of satisfaction for each item.

SATISFACTION:

	Very dissatisfied	Somewhat dissatisfied	Neutral	Satisfied	Completely satisfied	Not applicable to me
They fulfill their promises on time.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The quality of service is consistently high.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If I have a complaint, it is resolved quickly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am adequately informed and communicated with.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Staff know their products and services thoroughly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I receive prompt service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They provide quality financial advice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They understand my individual financial needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They provide convenient options for service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They provide flexible solutions to meet my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They make it easy to access my funds.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am greeted professionally and treated with respect.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offer investment products to meet my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Have lending products that meet my needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

RATING_SERV_IMP

9. Please rate the **importance** and your **satisfaction** with the following services offered by Access Credit Union.

Please rate your level of importance for each item.

IMPORTANCE:

	Not at all important	Generally unimportant	Neutral	Important	Very important	Not applicable to me
Conveniently located branches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hours of service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support via Member Solutions Centre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interactive teller machines (ITMs: i.e. video interaction)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone banking service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online banking service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile app service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confidential management of accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive financial products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive deposit rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive loan rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Innovation to meet the needs of members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

RATING_SERV_SAT

Please rate your level of satisfaction for each item.

SATISFACTION:

	Very dissatisfied	Somewhat dissatisfied	Neutral	Satisfied	Completely satisfied	Not applicable to me
Conveniently located branches	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Hours of service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support via Member Solutions Centre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Interactive Teller Machines (ITMs: i.e. video interactions)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Telephone banking service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Online banking service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mobile app service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Confidential management of accounts	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive financial products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive deposit rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive Loan rates	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Innovation to meet the needs of members	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OVERALL_SAT

10. What is your **overall** satisfaction with Access Credit Union's performance?

	Very dissatisfied	Somewhat dissatisfied	Neutral	Satisfied	Completely satisfied
Overall Level of Satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NPS

11. Please tell us how likely you are to recommend Access Credit Union to your family and friends.

Please choose a response on a scale of 1 to 10, where **1 means 'Would definitely not recommend'** and where **10 means 'Would definitely recommend'**.

	1	2	3	4	5	6	7	8	9	10
Rating	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NPS_COMMENT

Please tell us why you chose this rating.

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

OTHERFI_USE

12. Do you also use any of the following financial institutions for your personal banking ?

Please select all that you use.

- ☐ Assiniboine Credit Union
- ☐ Steinbach Credit Union
- ☐ Cambrian Credit Union
- ☐ Caisse Financial Group
- ☐ Another Credit Union not listed above (please specify)
- ☐ BMO
- ☐ CIBC
- ☐ RBC
- ☐ Scotiabank
- ☐ TD
- ☐ Digital-only bank (e.g. Tangerine, Simplii)
- ☐ Other (please specify)
- ☐ None

OTHERFI_DEPOSITS

13. Do you have deposits or loans with another financial institution?

- ☐ Yes
- ☐ No
- ☐ Unsure

WHY_OTHERFI_DEPOSITS

13a. Why did you choose another financial institution for your deposits or loans?

Please select all that apply.

- ☐ Rate
- ☐ Terms
- ☐ Accessibility/convenience
- ☐ Service
- ☐ Other (please specify)

PERCENT_DEPOSIT

14. Approximately what percentage of your total deposits and loans do you have with Access Credit Union?

Deposits (Including all savings and investments):

- ☐ Up to 25% ☐ 26 - 50% ☐ 51 - 75% ☐ 76 - 100%
- ☐ I currently do not have any deposits at Access Credit Union

PERCENT_LOANS

Loans (including lines of credit and mortgages):

- ☐ Up to 25% ☐ 26- 50% ☐ 51- 75% ☐ 76-100%
- ☐ I currently have no loans at Access Credit Union

OTHERFI_USE_BUS

Do you also use any of the following financial institutions for your business banking?

Please select all that you use.

☐ Assiniboine Credit Union

☐ Steinbach Credit Union

☐ Cambrian Credit Union

☐ Caisse Financial Group

☐ Another Credit Union not listed above (please specify)

☐ BMO

☐ CIBC

☐ RBC

☐ Scotiabank

☐ TD

☐ Digital-only bank (e.g. Tangerine, Simplii)

☐ Other (please specify)

☐ None

OTHERFI_DEPOSITS_BUS

Do you have commercial deposits or loans with another financial institution?

☐ Yes

☐ No

☐ Unsure

WHY_OTHERFI_DEPOSITS_BUS

Why did you choose another financial institution for your commercial deposits or loans?

Please select all that apply.

☐ Rate

☐ Terms

☐ Accessibility/convenience

☐ Service

☐ Other (please specify)

PERCENT_DEPOSIT_BUS

Approximately what percentage of your total commercial deposits and loans do you have with Access Credit Union?

Deposits (Including all savings and investments):

- ☐ Up to 25% ☐ 26 - 50% ☐ 51 - 75% ☐ 76 - 100%
- ☐ I currently do not have any deposits at Access Credit Union

PERCENT_LOANS_BUS

Loans (including lines of credit and mortgages):

- ☐ Up to 25% ☐ 26- 50% ☐ 51- 75% ☐ 76-100%
- ☐ I currently have no loans at Access Credit Union

COMMENTS_EXCEL

15. Where do you feel that Access Credit Union **exceeds your expectations?**

Please be as specific as possible.

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

COMMENTS_FAIL

16. Where do you feel that Access Credit Union **falls short of your expectations** and where you would like to see them improve their efforts?

Please be as specific as possible.

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

COMMUNICATION

17. What would be the best way for Access Credit Union to reach you with important announcements or information about financial-related issues that may affect you?

Please select your top three preferences.

- ☐ Telephone call
- ☐ Text
- ☐ Email
- ☐ Through the monthly statement
- ☐ Through the Access Credit Union website
- ☐ Through online banking
- ☐ Social Media (Facebook, Twitter, Instagram)
- ☐ Other method of communication (please specify)

TEXT_2

Please specify your preferred method of communication.

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

COMMUNITY_IMP

18. Please select the **top three** characteristics you feel are important in a financial institution.

Please indicate your top choice by entering a "1" next to the characteristic, followed by a "2 " and "3" to rank your top three choices.

They operate fairly and ethically.

They act in an environmentally responsible manner.

They support the community through community donations and sponsorships.

They support the community through volunteerism.

They support financial literacy.

They support economic development.

They support the environment.

They support children and youth.

They make a visible and meaningful difference in the communities they serve.

COMMUNITY_SAT

19. How would you rate Access Credit Union's performance in each of the following areas?

Please rate each item.

	Very poor	Needs some improvement	Neutral	Good	Excellent
They operate fairly and ethically.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They act in an environmentally responsible manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They support the community through community donations and sponsorships.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They support the community through volunteerism.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They support financial literacy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They support economic development.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They support the environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They support children and youth.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
They make a visible and meaningful difference in the communities they serve.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ESG_IMPORTANCE

20. Please tell us how important it is to you that Access Credit Union pursue the following priorities:

(Scale: 1 - Not at all important to 5 - Very important)

	Not at all Important		Neutral		Very Important
	1	2	3	4	5
Proactively seeking a culture of diversity, equity and inclusion in the organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Taking part in solutions to reduce the impacts of climate change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acting on the Call to Action #92 for the business community, as outlined by the Truth and Reconciliation Commission of Canada.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

COM_DONATIONS

21. Which community areas do you believe Access Credit Union should support through community donations, sponsorships, volunteerism, and fundraising?

Please select a maximum of 4.

- ☐ Arts & culture
- ☐ Children’s programs
- ☐ Education
- ☐ Environment
- ☐ Financial education & literacy
- ☐ Health, healthcare, & welfare
- ☐ Sports & recreation
- ☐ Scholarships & bursaries
- ☐ Seniors or Seniors’ programs
- ☐ Other (please specify)

BNK_CHANNELS

22. How do you conduct **MOST of your banking functions?**

Please select only one.

- ☐ In branch
- ☐ Contacting the Member Solutions Centre and speaking with a representative (through voice or chat).
- ☐ Online
- ☐ Mobile banking app
- ☐ Using automated telephone banking
- ☐ Using an ATM or ITM

DRAW_ENTRY

Thank you for completing Access Credit Union's Member Survey.**Do you wish to enter the draw for one of eight chances to win \$250 cash?**

- ☐ Yes
- ☐ No

ENTER_DRAW_NAME

Please provide your name, phone number and email to be entered for the draw.**By providing your personal information below, you are agreeing to the following:***I am providing my name and contact information for the express purpose of entering a random draw.**I understand that my name and contact information will not be associated with responses in the review of the survey results.**I consent for my contact information to be made available to Access Credit Union, and for Access Credit Union to contact me, in the event that my response is chosen from the draw.***Name:**

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

RESPONDENT_PHONE

Phone Number:

EMAIL

Email

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

TESTIMONIAL

Testimonial:

If you wish to provide a testimonial regarding your service at Access Credit Union, please do so below. You may include your name if you wish.

- ☐ N/A
- ☐ Refusal
- ☐ Do not know

TEXT_3

By providing your name, you are agreeing to the following:

I am providing my name for the express purpose of offering a testimonial.

I understand that my name will not be associated with responses in the review of the survey results.

I provide consent for my name to be made available to Access Credit Union in associated with the testimonial, and for Access Credit Union to potentially use my name in a testimonial.

Name:

- ☐ N/A
- ☐ Refusal
- ☐ Do not know