



February 2011



National Governance Webinars

PLEASE SHARE WITH YOUR BOARD!

CUSOURCE Credit Union Knowledge Network is proud to announce that on February 16, we are launching the “first” in a series of national governance webinars starting with *Working through Intra-Board Conflict to Lasting Results*.

This series is designed for graduates of the CUDA® Program, including Accredited Canadian Credit Union Directors as well as other experienced directors who may or may not be enrolled in the CUDA Program. The topics extend and enrich the governance background acquired through more formal means—such as the CUDA Program—as well as through experience on credit union and other boards. Webinar presenters will include both familiar and new names. It all adds to the excitement and value!

Participate and earn CE Credits! By participating in these webinars, Accredited Directors earn 1 continuing education credit when they participate in 2 webinars (i.e., 2 webinars = 1 CE credit).

Webinar: *Working through Intra-Board Conflict to Lasting Results*
Date: Wednesday, February 16 **Time:** 7:00 p.m. ET (1 hour)
Presenter: Alisdair Smith **Fee:** \$69 per person

To register interested directors, enter **intra-board conflict** in the *Catalogue Search* field on the LMS. Click **Register others** and follow the prompts. Or, contact [Client Solutions](#) for registration assistance.

Next webinar: Wednesday, March 2
Ian Glassford, CFO Servus Credit Union *speaks on Demystifying ALM and Interest Rate Risk Management.*

Presenting: An “Evolved” CUDA Level A The Next Evolution in Board Development

You have no doubt heard that there’s a *new* Level A in the CUDA Program. The **Foundations of Governance** has been re-invented: from content to design. [Click here for details](#) and **PLEASE, share this link to this brochure with your board!** New directors can register directly into the “new” Level A.

Directors who are working through the pre-2011 Level A, may enroll too. In fact, 2011 offers a special window of opportunity to directors who want access to the revised 7 online modules or to earn the new **Foundations of Governance Certificate**. To learn more, contact [Client Solutions](#).

Course Spotlight on Harassment and Violence Prevention

New 1-hour ecourse on Bill 168 now on the LMS!

CUSOURCE Knowledge Network has teamed up with *SkillSoft* to provide credit unions with an informative 1-hour ecourse on Bill 168—Ontario’s new workplace violence and harassment legislation.

Although these requirements currently apply in Ontario only, it is only a matter of time before similar requirements become Canada-wide.

With this new Bill, **workplaces are required to take specific, preventative action to address the risk of workplace violence and harassment.** Therefore, the legislation requires employers to develop:

- Anti-violence and harassment policies and programs
- Employee reporting and incident investigation procedures
- Emergency response procedure
- Process to deal with incidents, complaints & threats of violence.

This course is a great addition to existing anti-violence and anti-harassment programs. If your credit union doesn’t currently have a program in place—this is a great place to start.

eCourse: Harassment and Violence Prevention in the Canadian Workplace

Fee: \$7 per person

To register, log into the [LMS](#) > type **Harassment** in the *Catalogue Search* field > click **Register** to the left of the course name.

**CUDA® Exam Prep Webinars
Calling all Directors!**

Writing the *CUDA* exam is one of the requirements for becoming an *Accredited Canadian Credit Union Director*. In the following two webinars, directors review course material from Levels B & C of the *CUDA* Program in preparation for the exam.

Webinar Dates and Details:

Cluster 1: February 15 (6:00 p.m. ET)
Level B courses:

- Governance & Accountability
- Strategic Planning
- Board Development.....

Cluster 2: February 16 (6:00 p.m. ET)
Level B & C courses:

- Management Recruitment
- The Role of the Audit Committee
- Credit: Policy & Monitoring

Cost: \$95 per person /per webinar

Register By: February 10

Directors will be provided with a copy of the sample exam (also available in the *CUSOURCE*® Catalogue under the *CUDA* Program/Accreditation Exam).

Exam date: March 16

Register By: February 11

**February and March 2011
free PowerHour Webcast Schedule**

Space is limited so register NOW for the following *free PowerHour* information webcasts. Start time: 1:00 p.m. ET

Cohorts - The "only way to go". Find out why
 - Tuesday, February 8 (*register by February 4*)
 - Tuesday, February 22 (*register by February 18*)

An Accreditation for MSRs? Why?
 - Wednesday, February 9 (*register by February 7*)
 - Wednesday, February 23 (*register by February 18*)

See the current [webinar schedule](#). To register, log in to [CUSOURCE® LMS](#), then go to "Catalogue"> By Topic> Webinars

**Webinar Spotlight on
PIPEDA: Changes and Impacts Bill C-29**

Help your staff get up to speed on the proposed Bill changes!

Join privacy lawyer and consultant Fazila Nurani on 1 of 2 upcoming webinars. Designed for Privacy Officers & Deputy / Assistant Privacy Officers and others who need to be in-the-know, this 1-hour webinar will explain and provide strategies for complying with the proposed PIPEDA obligations.

When: February 9 or March 29 (*both sessions start at 1:00 p.m. ET.*)
Registration deadline: 2 business days prior to each webinar

Cost: \$129 per person

To Register, log into the [CUSOURCE LMS](#) > Enter **pipeda** in the Catalogue Search field > Click **Register** to the left of the course marked *PIPEDA: Proposed Changes and Impacts* > Select your date.

Please Note: As Alberta and British Columbia each have their own provincial privacy legislation, credit unions in these jurisdictions will not be impacted by the proposed amendments to the PIPED Act.

**CUIC March Exam:
Important Dates!**

March 16 is approaching quickly. Be sure to co-ordinate registrations for those employees wanting to write the exam.

For directors who have completed the *CUDA* Program, this is also an opportunity to write the accreditation exam.

Here are the upcoming critical dates for the March exam:

Registration Ends	February 11, 2011
Date for Canceling without Penalty	February 18, 2011
Exam Date	March 16, 2011

Please note: For those who registered in their *CUIC* course between December 1, 2009 and February 28, 2010, this is their **LAST** opportunity to write before their course expires.

**CUIC[®] Cohorts Continue to Grow
Registration Builds**

A quick reminder that registration for the following 2011 cohorts (online learning groups) is building. If you have employees who would benefit from “a supported” learning environment, have them register soon.

The Spring cohort session *starts March 14* and *ends* with the **June 15** exam. The deadline to register is March 4. Previous cohort participants are “reserving” their seats early so you need to enroll interested employees now. Seats are limited! The learning is not!

Spring Cohorts	Fee*
CU00-185-COHORT - Credit Union Products & Services	\$595
CU00-200-COHORT - The Credit Union System	\$595
CU00-210-COHORT - Consumer & Residential Mortgage Lending	\$695
CU00-240-COHORT - Fundamentals of Personal Financial Planning	\$695
CU01-345-COHORT - Commercial Lending	\$695

* Fee includes cost of materials, facilitation, orientation and exam-preparation conference calls, assignment grading and the final exam.

Please Note: The CUIC 340 cohort will be offered again this Fall.

To learn more about Cohorts...

To learn more about cohorts, our distinguished faculty, how and who will benefit from participating, join either of these two upcoming *free PowerHour webcasts* (Also listed in the *PowerHour schedule located on page 2 of this eNews*)

When: Tuesdays - February 8 or 22 (1:00 p.m. ET)
or

[Click here to read more on cohorts](#)

Spreading the Word

During the month of February, we will be communicating directly with employees who are enrolled in the self-study option in the CUIC courses listed above to tell them about the cohort option.

We will direct interested staff to you to discuss their participation in a cohort.

**MSRs...under recognized?
They don't have to be.**

The MSR Accreditation Program is designed to recognize high performing MSRs. But for MSRs to participate, they need a supervisor/manager trained on the program. The next Supervisor Training program runs from March 8 to March 29.

This series of 4 webinars explains the program and the role of supervisors/managers as the “eyes and ears” of CUSOURCE Knowledge Network on the frontline of your credit union.

In addition, participants receive the tools required to help coach and mentor their MSRs through the accreditation process.

Each session is approximately 2 hours and are scheduled every Tuesday at 1:00 p.m. during this 4-week series.

Registration Deadline: February 25

Fee: \$525 per person

For more information, join either of the following free *PowerHours* on:

February 9 or 23 at 1:00 p.m. ET

(see *PowerHour schedule on page 2 for registration details*)

For more information about any topic contained in this eNews, please contact **Client Solutions**.

Attention HR and CUDA Contacts: See the next two pages for upcoming ILT training

Highlight on Instructor-led Training for February and March 2011

The following two pages outline upcoming ILT sessions from the 2011 National Training Calendars for both employees and directors. You can find the link to the full calendar listings on the next page.

Instructor-Led Employee Training (February and March 2011)

Course Name	City/Town	Course Date(s)	Registration Deadline	Fee
National Online Training				
Understanding Business Financial Statements	Online	February 23, 24, March 2 & 3	February 9	\$375
Retail Lending for Self Employed Borrowers	Online	March 14, 15, 16, 17 & 18	February 28	\$375
British Columbia				
Introduction to Business Financial Statements Analysis	Vancouver	March 10 – 11	February 17	\$795
Effective People Management	Vancouver	March 22 – 23	February 24	\$855
Helping Others Succeed	Vancouver	March 28 – 29	February 24	\$1,345
Applied Consumer Lending	Vancouver	March 30 – 31	March 10	\$795
Alberta				
Applied Consumer Lending	Strathmore	March 9 – 10	February 17	\$795
Saskatchewan				
Commercial Loan Collection	Saskatoon	March 8 – 10	February 10	\$1,349
Manitoba				
Delinquency Collections and Security Realization	Winnipeg	March 2 – 3	February 10	\$795
Agriculture Problem Accounts and Collections	Brandon	March 21 – 24	February 24	\$1,349
Ontario				
Handling Estates Effectively	Toronto	February 24	February 3	\$425
Understanding Our Business	Toronto	March 2	February 10	\$425
Nova Scotia				
Applied Consumer Lending	Halifax	Feb 22 - 23	February 3	\$795
Handling Estates Effectively	Halifax	February 24	February 3	\$425
Breaking Cultural Communication Barriers	Halifax	March 10	February 17	\$425
Understanding Our Business	Pt Hawkesbury	March 23	March 3	\$425
New Brunswick				
Agriculture Financial Statement Analysis	Moncton	March 14 – 17	February 17	\$1,349
Prince Edward Island				
Motivate and Empower Your Staff	Charlottetown	March 8	February 10	\$425
Newfoundland				
Applied Residential Mortgage Lending	St. John's	March 2 – 3	February 10	\$795

Instructor-Led Director Training (February and March 2011)

Course Name	City/Town	Course Date(s)	Registration Deadline	Fee
Saskatchewan				
Level B Sessions				
Governance and Accountability	Saskatoon	March 11	February 17	\$295
Board Development and Performance Evaluation	Saskatoon	March 11	February 17	\$295
Strategic Planning	Saskatoon	March 12	February 17	\$295
Management Recruitment, Performance Planning & Evaluation	Saskatoon	March 12	February 17	\$295
Nova Scotia				
Level C Sessions				
Credit: Policy and Monitoring	Dartmouth	February 25	February 3	\$295
The Role of the Audit Committee	Dartmouth	February 25	February 3	\$295
Business Decision Making	Dartmouth	February 26	February 3	\$295
Nova Scotia Governance	Dartmouth	February 26	February 3	\$295
Level A Sessions				
CUDA® Level A 7 Modules Facilitated Workshop	Sydney	March 4-5	February 10	\$575
Foundations of Governance in Theory and Action Workshop	Sydney	March 6	February 10	\$425
Manitoba				
Level A Sessions				
CUDA Level A 7 Modules Facilitated Workshop	Winnipeg	March 25-26	March 3	\$575
Foundations of Governance in Theory and Action Workshop	Winnipeg	March 27	March 3	\$425
Level B Sessions				
Strategic Planning	Winnipeg	March 25	March 3	\$295
Board Development & Performance Evaluation	Winnipeg	March 25	March 3	\$295
CUDA Level A 7 Modules Facilitated Workshop	Sydney	March 4-5	February 10	\$575
Foundations of Governance in Theory and Action Workshop	Sydney	March 6	February 10	\$425
New Brunswick				
Level C Sessions				
Governing: A Risk-Based Business	Fredericton	March 25	March 3	\$495
Financial Hot Buttons	Fredericton	March 26	March 3	\$495
Credit: Policy and Monitoring	Fredericton	March 27	March 3	\$295
Role of the Audit Committee	Fredericton	March 27	March 3	\$295
Newfoundland				
Level C Sessions				
Financial Hot Buttons	Gander	March 11	February 17	\$325
Market Risk: The Big Challenge	Gander	March 11	February 17	\$325
Leadership Succession and Continuity Planning	Gander	March 12	February 17	\$495
Governing: A Risk-Based Business	Gander	March 12	February 17	\$425



Now Online: Instructor-Led Training (ILT) Calendars for Directors & Employees
 Planning for training "just got easier".

Both calendars mirror the same structure:

- **Course Schedule and Pricing** (by province, course, city, course date(s), registration deadline and fees)
- **Registration Information**
- **Course Descriptions** (descriptions for each ILT outlined in this calendar sorted alphabetically)
- **Calendar of Important Dates** (outlining CUIC® exam dates and office closure dates).

[Download your copies](#) and preview the ILT training offered in your area.

