



## Directors Applaud the First of a Series of National Governance Webinars

On February 16<sup>th</sup>, CUSOURCE Credit Union Knowledge Network launched the *first* in a series of national governance webinars.

While open to all board directors, this series was designed specifically for experienced directors. Participants in the first webinar, *Working through Intra-Board Conflict to Lasting Results*, applauded the webinar format, the quality of the content and the presenter, **Alisdair Smith** (CUSOURCE National Learning Facilitator).

*“The webinar is an efficient and cost effective learning tool. Please continue down this path.” and “The one hour format does not produce ‘information overload’ giving one time to absorb and think about new concepts.”*

The webinar topics in this series are designed to extend and enrich the directors’ governance background acquired through formal means—such as the *CUDA*® Program—as well as through experience on credit union and other boards.

Although it is too late to register for the March 2<sup>nd</sup> webinar, *Demystifying ALM and Interest Rate Risk Management*, presented by Ian Glassford, CFO Servus Credit Union, **there’s still time to register for the following sessions:**

March 23	Executive Compensation: What You Need to Know
April 6	Managing Risk Through Prudent Oversight: Nose in. Fingers Out.
April 20	Electronic Communications: Your Role in Preventing a Privacy Breach
May 11	The Role of the Board in Corporate Social Responsibility
May 18	Good Governance: What the Regulators are Looking For
June 1	Leveraging Consumer Trends to Grow
June 15	Merger Deal Breakers

**Time:** 7:00 p.m. ET      **Fee:** \$69 per person / per webinar

**Participate and earn CE Credits!** Accredited Directors earn 1 continuing education credit when they participate in 2 webinars.

[Click here for a full overview of the webinar titles, presenters, and for registration information.](#)

### Course Spotlight addressing Goal Setting

Looking for practical techniques to facilitate goal setting with staff or management?

Then, take a look at the following ecourses that provide the tools to assist with setting and redefining goals, as well as nuts-and-bolts planning for achieving those goals.

#### SkillSoft eLibrary Courses:

- o [Doing Business Professionally: Goals and Goal Setting](#)
- o [Doing Business Professionally: Managing Goals](#)
- o [Management Essentials: Developing Your Direct Reports](#)
- o [Optimizing Your Performance on a Team: Establishing Team Goals and Responsibilities \(One Hour\)](#)

#### Harvard ManageMentor10® (HMM)

- o [Harvard: Goal Setting](#)

Why not equip your management and staff *by adding these ecourses to their learning plans.*

Goal setting is a great way to drive performance and results and maximize the effectiveness of staff activities across your credit union.

#### Not a SkillSoft Subscriber?

Become one for \$99 pp/per year and get access to over 1,200 business and desktop skills titles. [See brochure...](#)  
[See detailed course catalogue...](#)

#### Don't have an HMM License?

For \$189 pp/per year, your leadership team can access 42 practical modules. [See brochure...](#)

## Attention Directors: Announcing the National 2011 CUDA® Camp

### Plan to attend this year's *National* 2011 CUDA Camp | April 29 to May 1

Be a part of this *national* event where credit union directors new or experienced, can attend professional development workshops to expand their governance knowledge. This year's workshops include an all *New* Level A where directors who attend can also qualify to receive the new *Level A Foundations of Governance certificate*.

With increased emphasis on the accountability of the board for stewardship, directors won't want to miss out on this workshop on *Your Fiduciary Role: Using Financial Statements to Evaluate Critical Risk Areas*, a *NEW* Continuing Development Credit facilitated by Darcy Haw in partnership with Meyers Norris Penny.



*Opening remarks to be given by Andy Poprawa, President & CEO, Deposit Insurance Corporation Ontario.*

This continuing development workshop is ideal for directors who have a basic understanding of their credit union's financial statements and feel ready for the next level of sophistication. Directors should come prepared with any courageous questions they want to ask! Audit Committee members will also want to attend.



Credit Union Central of Canada

2011 CANADIAN CONFERENCE FOR CREDIT UNION LEADERS

April 30–May 4  
Scotiabank Convention Centre  
(Niagara Falls, Ontario)

To register for this event, visit:  
[www.cucentral.com/eventsconf](http://www.cucentral.com/eventsconf)

for conference and registration details!

And that's not all! Directors who attend this camp can stay on to network with strategic partners, other credit union and provincial central leaders at this year's **2011 Canadian Conference for Credit Union Leaders**. Both events are occurring *jointly* at the Scotiabank Convention Centre, *Niagara Falls, Ontario*.

To find out more on how these workshops will challenge and broaden a director's governance knowledge, [click here for an overview of the professional development workshops](#) featured at the *National* 2011 CUDA Camp. See you there!

## Spring Encore of 2010's National MSR Virtual Conference

We know it's impossible to send all MSRs to a single training event without shutting your doors—this is why CUSOURCE Knowledge Network is pleased to be able to offer a *Spring Encore* of our *2010 National MSR Virtual Conference coming in May 2011*.

Respondent's overall perception of this conference ranked exceptionally high:

- 95% found the webinar delivery an effective way to learn
- 98% said the information would help in their frontline position
- 94% would attend again or recommend it to another MSR

Overall, supervisors who attended the sessions said that "CUSOURCE Knowledge Network has created an exceptional opportunity for MSRs with this type of conference" and "I wish we could have sent more of our MSRs".

Start thinking about your MSRs and other frontline staff who missed last fall's event, and watch for more details in the coming weeks.

**My Learning Story: Bill Falconer, Vice President, Organizational Development, Valley Credit Union**

**Is Online Group Learning Part of Your Succession Planning?**

Bill Falconer, Vice President, Organizational Development at Valley Credit Union in Nova Scotia has a challenge—filling the knowledge gap between those who are “soon to retire” and those who will assume their responsibilities. “We simply must get employees ready to take over from those who will be retiring over the next five years,” explains Falconer. “And, I believe CUSOURCE® cohorts will be a significant part of our succession planning.”



As a longtime facilitator of the *Fundamentals of Personal Financial Planning* cohort, Falconer fully appreciates the value of learning in this supportive environment. “I have found that once students get into taking cohort courses, they really like the structured approach and interaction with other students across the country,” says Falconer. “Those who take CUIC® courses in a cohort,” he continued, “seem to develop a keener interest in the material and prefer the cohort for subsequent courses.”

[Read full story here....](#)

**Faculty Spotlight: Rob Eager and Management Development In-house**



Rob Eager is President of Performance Pathways, and an experienced and accredited CUSOURCE® Facilitator since 2004. Rob teams up with credit unions to broaden their management capabilities and enhance employees effectiveness with three management development courses:

- Managing for Performance,
- Helping Others Succeed, and
- Situational Communications.

Through these three courses, Rob shows how management and staff can increase their contributions, all while being engaged and more productive.

As you develop your performance plans for your credit union, we can help by bringing these courses to you, *in house!*

Contact [Client Solutions](#) today to discuss your in-house training program needs and join other credit unions such as East Coast Credit Union, Credential Financial, Westoba Credit Union and Sunrise Credit Union who have already benefited.

*CUSOURCE Knowledge Network provides different solutions for different needs.*

# Share Your Learning Story Contest

Every learner has a story!

On April 1<sup>st</sup>, CUSOURCE Knowledge Network will start its *first Share Your Learning Story contest*.

If you are a credit union leader, manager or staff member who has experienced the benefits of CUSOURCE training, we want to hear your story!

Watch for the official launch and contest details in April 1<sup>st</sup> eNews.



Left to right: Bill Falconer (Valley CU), Theresa Dergousoff (Grand Forks CU), Roseann Sweet, (United Communities CU), and Rick Doucette (Coastal Financial CU) are a few of the many stories that we’ve received and shared with you over the years.

**Share YOUR story and you could WIN!**



Have a story that you’d like to share?

Send it to:  
[mystory@cusource.ca](mailto:mystory@cusource.ca)

## Take Action! Addressing the Risk of Workplace Violence & Harassment

...with this 1-hour ecourse which addresses Ontario's Bill 168

This ecourse is a great addition to your existing anti-violence and anti-harassment program. If your credit union doesn't currently have a program in place, why not start here.

**eCourse:** Harassment and Violence Prevention in the Canadian Workplace

**Fee:** \$7 per person

Although these requirements currently apply in the province of Ontario only, the concepts apply Canada-wide.

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

## Webinar Spotlight: Social Networking

### Social Networking - An Employer's Guide for Workplace Strategies

Join privacy lawyer and consultant Fazila Nurani in either of these upcoming webinars. Designed for Human Resources directors/staff, department managers, privacy officers and others who need to be in-the-know, this 1-hour webinar will provide key strategies around social networking. Cost: \$129 per person

**When:** March 8 (*registration by March 7*) or March 30. Both start at 1:00 p.m. ET.

To Register, log into the [CUSOURCE LMS](#) > Enter Social Networking in the Catalogue Search field > Click Register to the left of the course > Select your date.

## March and April 2011 free PowerHour Webcast Schedule

Space is limited so don't delay in registering for these *free* PowerHour information webcasts. Start time: 1:00 p.m. ET

### An Accreditation for MSRs? Why?

- Wednesday, March 9 (*register by March 7*)
- Wednesday, April 20 (*register by April 18*)

### Accredited Commercial Lender: The Road to Success-Getting There from Here

- Thursday, March 24 (*register by March 22*)

### Cohorts - The "only way to go". Find out why

- Wednesday, April 6 (*register by April 4*)

### Exploring the Café Concept: Harvard ManageMentor® Virtual Cafés - Taking HMM Cafés to the next Level

- Tuesday, March 29 (*registration open March 4*)

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

## Important Dates to Keep in Mind

### CUIC® Spring Cohorts

**Registration Deadline:** March 4

The spring cohort session *starts* March 14 and *ends* with the June 15 exam. [Click here to learn more...](#)

Also, please join us in either of these two Cohort Orientation Webinars: March 3 @11 a.m. ET or March 10 @ 1 p.m. ET.

### Supervisor Orientation to the MSR Accreditation Program

**Registration Deadline:** March 4

The next Supervisor Training program runs: **March 8 to March 29**  
[Click here to learn more...](#)

### PIPEDA: Changes and Impacts Bill C-29

**Registration Deadline:** March 25

This one-hour webinar takes place on March 29 at 1:00 p.m. ET. See the current [webinar schedule...](#)

### CUIC March Exam

**Exam Day is March 16<sup>th</sup>**

Good luck to those participating. *Next Exam day is June 15<sup>th</sup>*

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

## Highlight on Instructor-led Training for March and April 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 (March and April 2011)				
Course Name	City/Town	Course Date(s)	Registration Deadline	Fee
<b>British Columbia</b>				
Applied Consumer Lending	Vancouver	March 30 – 31	March 10	\$795
Delinquency, Collections and Security Realizations	Prince George	April 19-20	March 31	\$795
<b>Alberta</b>				
Applied Consumer Lending	Strathmore	March 9 – 10	February 17	\$795
Delinquency, Collections and Security Realizations	Airdrie	April 6-7	March 17	\$795
<b>Saskatchewan</b>				
Applied Residential Mortgage Lending	Saskatoon	April 6-7	March 17	\$795
Effective People Management	Regina	April 19-20	March 31	\$855
Practical Project Management	Saskatoon	April 27	April 7	\$425
<b>Manitoba</b>				
Agriculture Problem Accounts and Collections	Brandon	March 21 – 24	February 24	\$1,349
Understanding Business Financial Statements	Winnipeg	April 5	Mar 10	\$425
Applied Residential Mortgage Lending	Winnipeg	April 12-13	March 17	\$795
Effective People Management	Winnipeg	April 26-27	March 31	\$855
Handling Estates Effectively	Brandon	April 27	April 7	\$425
RESPs - The Fundamentals	Brandon	April 28	April 7	\$425
<b>Ontario</b>				
Delinquency, Collections & Security Realizations	Toronto	April 6-7	March 17	\$795
Effective People Management	Toronto	April 5-6	March 17	\$855
RESPs - The Fundamentals	Peterborough	April 19	March 24	\$425
Handling Estates Effectively	Peterborough	April 20	March 24	\$425
<b>Nova Scotia</b>				
Understanding Our Business	Pt Hawkesbury	March 23	March 3	\$425
<b>Newfoundland</b>				
Applied Consumer Lending	St. John's	April 27-28	April 7	\$795

**Instructor-Led Director Training (March and April 2011)**

Course Name	City/Town	Course Date(s)	Registration Deadline	Fee
<b>British Columbia</b>				
<b>Level B Sessions</b>				
Management Recruitment, Performance Planning & Evaluation	Vancouver	April 27	April 7	\$295
Governance and Accountability	Vancouver	April 27	April 7	\$295
<b>Level A Session</b>				
Foundations of Governance in Theory and Action	Vancouver	April 28	April 7	\$425
<b>Continuing Development Session</b>				
Your Fiduciary Role: Using Financial Statements to Evaluate Critical Risk Areas	Vancouver	April 28	April 7	\$495
<b>Saskatchewan</b>				
<b>Level A Sessions</b>				
Foundations of Governance – The 7 Modules	Regina	April 1-2	March 17	\$575
Foundations of Governance in Theory and Action	Regina	April 3	March 17	\$425
<b>Manitoba</b>				
<b>Level A Sessions</b>				
Foundations of Governance – The 7 Modules	Winnipeg	March 25-26	March 3	\$575
Foundations of Governance in Theory and Action	Winnipeg	March 27	March 3	\$425
<b>Level B Sessions</b>				
Strategic Planning	Winnipeg	March 25	March 3	\$295
Board Development & Performance Evaluation	Winnipeg	March 25	March 3	\$295
<b>Ontario</b>				
<b>Level B Sessions</b>				
Governance and Accountability	London	April 16	March 31	\$295
Board Development & Performance Evaluation	London	April 16	March 31	\$295
Strategic Planning	London	April 17	March 31	\$295
Management Recruitment, Performance Planning & Evaluation	London	April 17	March 31	\$295
<b>Level A Sessions</b>				
Foundations of Governance – The 7 Modules	Niagara Falls	April 29-30	April 7	\$575
Foundations of Governance in Theory and Action	Niagara Falls	May 1	April 7	\$425
<b>Continuing Development Session</b>				
Your Fiduciary Role: Using Financial Statements to Evaluate Critical Risk Areas	Niagara Falls	April 30	April 7	\$495
<b>New Brunswick</b>				
<b>Level C Sessions</b>				
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
<b>Prince Edward Island</b>				
<b>Level A Sessions</b>				
Foundations of Governance – The 7 Modules	Summerside	April 30-May 1	April 7	\$575
Foundations of Governance in Theory and Action	Summerside	May 2	April 7	\$425

Visit the Training and Events page to [download your copies of both of these calendars](#).

For more information about any topic contained in this eNews, please contact [Client Solutions](#).