



intouch

LEARNING... SIMPLY PART OF YOUR DAY

Solid Brand Starts With Solid MSR's

Cost-effective training for front-line staff now available

Service representatives are every credit union's brand ambassadors. For that reason, it is critical that they convey confidence, professionalism and extend a level of service that both defines your brand and places your credit union in the "top of mind" category for financial services.

Now there is a national development program – the MSR Start Series – that can help new MSR's reach "brand performance" levels more quickly and save your credit union both time and money.

Developed in direct response to credit unions' requests for fundamental front-line staff training, the MSR Start Series consists of six online courses that can be taken separately or as an entire Series. The courses examine credit union products from core to complex, highlight risk management



practices, and reinforce the importance of MSR's knowing and understanding their credit union's policies and procedures.

More than courses

This guided learning program comes with three indispensable documents – the Manager's Guide, Employee's Guide and customizable Appendices – all of which use a development approach that builds on the principle of "see, learn, do." These documents include a learning roadmap that starts with the first days up to the first two years on the job, a sample new MSR orientation program, and observation and evaluation checklists.

They also include a list of on-the-job check-point activities that allow new employees to

Continued on page 2...

Quest for the "Ideal" Business Relationship Manager

National career development program designed to fill the needs of credit unions

Your best lenders – the ones with the most experience and knowledge – are gearing up for retirement. At the same time, the Canadian workforce is shrinking: according to Statistics Canada, in roughly 10 years, Canada may have more people retiring from the workforce than people entering it.

The implications for credit unions, from shrinking talent pools to high turnover rates, mean that credit unions, one by one, are facing the same dilemma: how to attract, develop *and* retain the best talent that's out there – or that might be within their credit union right now.

In response, CUSOURCE Credit Union Knowledge Network (CUSOURCE Knowledge Network) and CBOS have created a partnership.

Responding to credit union needs

CBOS – the Canadian Business Owner Strategy – is currently creating a national career development program that will help credit unions attract, develop and retain commercial lending talent from *within* the credit union system.

CUSOURCE Knowledge Network learning consultant, Michelle Manary, along with consultant Kevin Zakus, former VP of Business Banking at Vancity, have been working with the CBOS HR Sub-committee since spring 2008 to build a program that will take a commercial lender a step further and yield the "ideal" Business Relationship Manager.

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Solid Brand Starts With Solid MSRs (continued from front page)

apply the concepts and information learned in the Series to real life in their credit union.

Michelle Manary, *CUSOURCE* Knowledge Network learning consultant, ensured that the program delivers what credit unions need. “We involved credit union representatives from across the country in contributing to content and reviewing of all six of the courses and both of the guides,” says Manary. As a former VP of Human Resources at Assiniboine Credit Union, Manary is very familiar with the personal and corporate challenges of quickly and effectively developing high performing MSRs.

“The program offers great tools and suggestions for training new MSRs,” says Carmen Gemmill, training officer at Northern Savings Credit Union, BC. “It’s very professional, well designed and easy to use,” she continues. “I like the fact that the courses focus on sales and service right from the start. It starts people on the right foot because they know what’s expected of them as a new MSR.”

Not Just for MSRs

The first course in the MSR Start Series – *Orientation* – can be used for new employees going into a variety of positions. Other courses may also be used as a refresher for longer serving employees. For greatest impact, supervisors and managers are encouraged to be familiar with the courses before their MSRs are enrolled.

As a new Assistant Branch Manager at Beaubear Credit Union, NB, Cynthia McLean enrolled in the MSR Start Series to learn more about the credit union system and the role of MSRs.

“The content is quite detailed but to the point. The courses are very informative – they really opened my eyes and let me see behind the scenes in a way that I wouldn’t have otherwise. I would definitely recommend it,” says McLean.

MSR Start Series Highlights

What is it?

MSR Start Series is a standardized national program that offers excellent training and development for MSRs, from the first day up until two years on the job.

It offers a consistent learning experience and provides a launch for further development.

Courses may be purchased separately, or as a complete Program:

1. *Orientation*
2. *Cash and Basic Transactions*
3. *Cheque Negotiation, Security and Risk Management*
4. *Electronic Banking Transactions*
5. *Core Product Knowledge*
6. *Advanced Product Knowledge*

Includes three *free* indispensable resources, also available in the Catalogue.

A Manager’s Guide (CU01-MSR-MTG)

Uses the “see, learn, do” concept to describe activities through the first 15 days on the job and beyond.

An Employee’s Guide

(CU01-MSR-ETG) Allows new employees to take charge of their learning by explaining what is expected of them. Gives them a sense of direction and tells them “there is a plan for me.”

Customizable Appendices

(CU01-MSR-MA) This Word document includes five Appendices customizable to your credit union’s needs: a suggested Orientation Program, an MSR Evaluation Checklist, MSR Checkpoint Questions and a preparation worksheet for a Product Knowledge Presentation.

Enhance Existing Orientation Programs

Credit unions that already have a new MSR training program can reduce already stretched training resources and the overall cost per hire by choosing selectively from the six-course menu on an as-needed basis. The courses, as well as concepts and material in the guides and appendices, can be easily incorporated into existing programs, and serve as a valuable addition to training and orientation that is already in place.

Start Something New

At the same time, the Series of six courses plus training resources, such as a suggested new MSR orientation checklist and observation and evaluation tools, are comprehensive enough to serve as a stand alone training program.

In an efficient and cost-effective way, the Series provides credit unions with a complete, ready-made fundamental training program for all employees with direct member contact.

Further, the resources listed in the Appendices encourage a culture of continuous learning and a career with your credit union that can lead to other positions.

Find the MSR Start Series in the *CUSOURCE*® Catalogue, under “By Library.”

MSR Accreditation

For employees who have mastered the knowledge and skills of being an MSR, the national MSR Accreditation Program provides official recognition of their performance achievement. For more information, contact your Regional Office or visit www.cusource.ca. Click on *CUIC*® > Professional Designations.

Quest for the “Ideal” Business Relationship Manager

(continued from front page)

The Business Relationship Manager Career Development Program will be unveiled at Credit Union Central of Canada’s (Canadian Central) National Lending Conference in St. John’s, NL, in early October. The program’s aim is to help credit unions attract and prepare employees for various roles within the business and commercial credit areas.

“Credit unions know they can no longer rely on attracting people with experience from other FIs,” says Zakus. “They know there is a pressing need to identify and train people from within their organizations to become competent, confident and capable Business Relationship Managers.”

Education + Experience + Exposure + Mentorship = “Ideal” Business Relationship Manager

The program will be divided into four components – education, experience, exposure and mentorship. It will be flexible and adaptable so all credit unions nationally, regardless of size or location, can take advantage.

“This will be a very efficient learning program,” says Manary, adding that it will embrace hard and soft skills as well as coaching and mentoring. The program will apply to everyone from commercial loan clerks right up to the managers for commercial loans or business centres.

Manary and Zakus are also working on guides for employees, managers and mentors, as well as appendices that are customizable to each credit union’s needs, all of which will be available through CUSOURCE Knowledge Network.

Five Recruitment Streams

Manary identified five key areas or streams from which credit unions would typically recruit candidates for the Business Relationship Manager positions: recent university or college graduates; retail account managers from within a credit union branch; commercial administration and analysis; branch managers; and existing Business Relationship Managers. Each stream has its own associated “book of skills” that would point to a

particular development roadmap that would enable the traveller to arrive at the target destination – the “ideal” Business Relationship Manager.

Drawing from a detailed job profile for the Business Relationship Manager, the program developers created learner roadmaps for each of the five recruitment streams for this position. A sixth, generic roadmap will allow credit unions to pick and choose learning as needed.

Manary and Zakus are not working in isolation. In a truly co-operative spirit, HR professionals and commercial lenders coast to coast are involved in the program’s development. “The collaboration and dedication from across the system has been extraordinary,” Manary says.

“There is a pressing need in the credit union system to retain staff and train from within.”

— Kevin Zakus, Consultant, CBOS

Roadmaps to effective lenders

The development roadmaps will include existing courses on the CUSOURCE® Learning Management System (LMS) and will also identify training gaps in the area of lending. CUSOURCE Knowledge Network will work to fill these gaps wherever possible. This may include new instructor-led courses, online courses and other possible delivery alternatives.

Lending courses already offered by CUSOURCE Knowledge Network include self-study, online classes or cohorts, as well as “in class” instructor-led courses (ILT). CUSOURCE Knowledge Network also offers two professional accreditations in this area: *Accredited Commercial Lender* and *Accredited Commercial Lending Administrator*.

To find out more contact your Regional Office, or login to the CUSOURCE LMS and search the offerings under “lending.”

RMA and eMentor™ – Support for Commercial Lenders

Commercial lenders and risk managers across the system have access to a vast research and resource pool through a national membership with the Risk Management Association (RMA) provided by Canadian Central.

In addition to the RMA membership, Canadian Central purchased a license to eMentor – RMA’s online tool that brings industry resources, best practices (for Canadian users), e-cases and other learning and assessment tools and the RMA Journal to the desktop of every interested commercial lender and credit manager.

The RMA eMentor is a valuable online tool designed to support lenders in assessing risk and making smart credit decisions. It is full of information in the area of commercial risk management, sales and training.

Access to eMentor is also included in the \$40 subscription to CUSOURCE Knowledge Network. Just login to CUSOURCE LMS, enter “ementor” in the Catalogue Search field, and hit GO. Or click here for instructions.

CBOS and the Recipe for a Great Business Relationship Manager

Many credit unions are anxiously waiting for the release of the Business Relationship Manager Career Development Program. By making this program available nationally, CBOS is responding to an issue that’s very real to a lot of Canadian credit unions.

The program will offer a consistent standard of training and development and thus help credit unions gain competitive advantage in the quest for talent.

“Credit unions see this program as a way to overcome current challenges,” says Zakus. “And we’re here to deliver.”

Details of this new and exciting program will be unveiled at the 2008 National Lending Conference, October 4-7, in St. John’s, NL.

Beyond Graduation

When a trio of board directors at Salmon Arm Savings & Credit Union, BC, heard about the new national Accreditation for the Credit Union Director Achievement (CUDA®) Program at their board table last spring, they were immediately intrigued.

They wanted to go for the Accreditation but they didn't know if they could handle the challenge.

Excellence in Board Governance

Today, those three directors – Laura Nyeste, June Stewart and John Schlosar – are three of the 10 directors and one CEO from across the country who accepted the challenge. They wrote the exam in November 2007 and were awarded the Accredited Canadian Credit Union Director (ACCUD) designation shortly thereafter (see page 5 for a full list of ACCUD Graduates).



DALHOUSIE UNIVERSITY
Inspiring Minds

Awarded jointly by Dalhousie University and CUSOURCE Knowledge Network, the ACCUD designation is granted to CUDA Program graduates who meet several criteria, including passing the Accreditation exam. Developed and marked by Dalhousie University, this exam is based on all three levels of the CUDA Program. To qualify for the Accreditation, candidates need to complete all CUDA Program requirements and have served on a credit union board for two years. To maintain their Accreditation, accredited directors must meet annual continuing education credits.



Credit Union Director Achievement Program

Beyond Designation

This national Accreditation serves as the official proof of directors' commitment to the credit unions and communities they serve. It is also a personal validation of knowledge and skill. "The Accreditation reaffirms everything you know," Nyeste says, "and helps you connect this knowledge to your job as a director." It allows directors to grow with time and adapt to changing situations by encouraging them to continue learning.

To help prepare for the Accreditation exam, the three directors took advantage of the [elective] exam preparation courses offered by CUSOURCE Knowledge Network. They admit that the preparation for the exam could be intensive, but they all agree that it was a valuable investment. "It provides our membership with assurance that we know what we're doing," says Stewart. "It was definitely worthwhile."

For Nyeste, Stewart, and Schlosar, the Accreditation was not only a validation of knowledge but also a personal challenge – a goal that they met and of which are very proud.

"I now have a more comprehensive, more balanced view of my role and my abilities as a director," says Schlosar. "You get the totality of what you're learning. Earning the Accreditation has increased my ability

and the confidence I bring to the Board table and to the membership – that you are doing your best for them."

Salmon Arm Savings & Credit Union Board has established a supportive environment and culture for directors to improve their skills and abilities. Nyeste, Stewart, and Schlosar are leading their board by example. The current board Chair, Glenn Hill, is now encouraging all Salmon Arm directors to obtain their Accreditation.

"Earning the Accreditation has increased my ability and the confidence I bring to the Board table and to the membership – that you are doing your best for them."
— **John Schlosar**, Board Director, Salmon Arm Savings & Credit Union, BC

National Recognition of Accomplishment

Earning the Credit Union Director Accreditation requires dedication and a desire to constantly stretch one's knowledge and skill. It allows directors to grow with time and adapt to changing situations by encouraging them to continue learning.

Congratulations to the system's 11 Accredited Canadian Credit Union Directors for the extraordinary effort and commitment to learning and bettering themselves. And best wishes to those who are pursuing the Accreditation right now.

The registration deadline for November CUDA exam is October 13, 2008.

CUSOURCE Knowledge Network offers two, two-hour national webinars, one-day classroom course (with sufficient interest), and a "sample" exam to help prepare for the ACCUD exam.

For more information about the Accreditation, or the exam preparation courses, contact your Regional Office.

ACCREDITED CANADIAN CREDIT UNION DIRECTORS



BC
Randy Brandvold
Accredited
Canadian Credit
Union Director
Bulkley Valley



BC
Theresa Dergousoff
Accredited
Accredited
Canadian Credit
Union Director
Grand Forks



BC
Sanford Osler
Accredited
Canadian Credit
Union Director
North Shore



BC
Laura Nyeste
Accredited
Canadian Credit
Union Director
Salmon Arm



BC
John Schlosar
Accredited
Canadian Credit
Union Director
Salmon Arm



BC
June Stewart
Accredited
Canadian Credit
Union Director
Salmon Arm



NS
Bill Mills
Accredited
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Union Director
Heritage

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SK
Louis Lapaire
Raymore

NL
Steve Blackwood
Easternedge

NS
John Peach
Heritage

NS
Kenneth Shea, Pres. & CEO
Heritage

Fast-tracking Through CUDA®

Available to credit union directors since 1988, the Credit Union Director Achievement (CUDA) Program is a three-level national program designed to help strengthen governance practices and knowledge in the credit union system.

Fitting CUDA courses into work life and family life, board and committee meetings is hard. But one credit union has come up with a unique solution.

FirstOntario Credit Union is piloting a novel approach that would enable all of their directors to complete CUDA Program within six months. Jerry Bishop, Manager, Corporate Learning and Development at FirstOntario, worked with CUSOURCE Knowledge Network Ontario Manager, Daniel Papa, to create a custom learning schedule for their Board of Directors.

Instead of waiting for their directors to ask for CUDA training, director training at FirstOntario now falls under the umbrella of Learning and Development. “We have changed our approach from reactive to proactive, making it easier for our directors to actually get involved,” says Bishop.

Since May 2008, this credit union on average offers two CUDA courses each month in their Stoney Creek training centre. It is flexible and organized to fit directors’ busy schedules.

To make this flexible approach happen, the Ontario team at CUSOURCE Knowledge Network worked with other credit unions in the region to co-ordinate sessions that would enable other credit unions to join FirstOntario directors in their CUDA training.

“The value of partnership is catching on,” says Bishop. “There is an overwhelming sense of ‘we can make it happen.’ It’s wonderful.”

And the directors themselves? “They completely love it,” Bishop says.

“The participation has been phenomenal. Directors repeatedly tell me what a wonderful program this is, and I have so many positive comments about the courses!”

For more information on fast-tracking through the CUDA Program or on the Accredited Canadian Credit Union Director (ACCUD) designation, contact your Regional Office.

ACCREDITED MEMBER SERVICE & CALL/CONTACT CENTRE REPRESENTATIVES



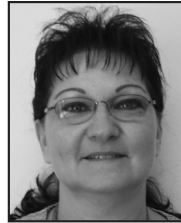
AB
Brenda Redhead
Accredited
Member Service
Rep.
Wainwright



SK
Terri Bodnarchuk
Accredited
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Rep.
Biggar



SK
Karla O'Brian
Accredited
Member Service
Rep.
Biggar



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Rep.
Cypress



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Member Service
Rep.
New Community



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CONGRATULATIONS TO ALL THE GRADUATES PICTURED AND TO:

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Wainwright

AB
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Wainwright

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Cypress

SK
Jill Parsonage
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SK
Carmen Duke
Eastend

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Innovation

SK
Rachelle Kitz
Spectra

MB
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Gimli

MB
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Gimli

MB
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Sunova

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PE
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Synergy | NL
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| SK
K. Tanya Llewellyn, FCUIC
Affinity | SK
Megan Veller, FCUIC
Innovation | PE
Gwen MacDonald, FCUIC
Metro | |

LENDING ACCREDITATION GRADUATES

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Accredited Commercial Lender
Dauphin Plains | MB
Susan Steinmetz, ACL
Accredited Commercial Lender
Gimli |
|--|--|

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Teachers | ON
Joyce McLeod, CFP, ACUIC
Personal Financial Advisor
Northern |
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CONGRATULATIONS TO ALL THE GRADUATES PICTURED ABOVE AND TO:

- | | | |
|---|--|---|
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Canora | SK
Kelly Watson, ACUIC
Affinity | MB
David Morgan, ACUIC
Entegra |
|---|--|---|

CUIC® ASSOCIATES WITH HONOURS Congratulations to **Ray Hall, ACUIC; Kerry Maynes, CFP, ACUIC; Craig Zamzow, CFP, FCUIC, ACUIC**

CUIC® ASSOCIATES WITH SPECIALTY IN LENDING STUDIES Congratulations to **Glen Tosh, ACUIC; Kelly Longley, ACUIC**

CUIC® ASSOCIATES WITH HONOURS AND SPECIALTY IN LENDING STUDIES Congratulations to **Trudy Rasmuson, ACUIC; David Morgan, ACUIC**

Register Now for the Strategic Management Cohort

The cohort – Strategic Management for Credit Union Professionals (CU01-315-COHORT) – allows employees not only to learn about strategy, but also to discuss it, debate and apply it in an “online classroom” environment.

Developed in partnership with Dalhousie University and with the direction of a national credit union advisory group, the course is designed for credit union professionals involved in strategic analysis and strategy formulation and implementation.

Facilitator Mark Reno reaps kudos from previous cohort participants. He brings an effective blend of academic depth and practical “strategic experience” in both co-operative and private sector organizations.

The course uses a Canadian textbook *Strategic Management: Creating Competitive Advantages*, as well as case studies, assignments, conference calls, and instructor-led discussion forums to enhance the learning experience and to pace participants through the course. The final grade is a combination of assignments, group participation and the final exam.

Participants learn about:

- Analyzing the external and internal environments of the firm
- Business level strategy
- Recognizing firm’s intellectual assets
- Corporate level strategy
- Digital business strategy

- Strategic control and corporate governance
- Creating effective organizational designs
- Strategic leadership

Among its other benefits, this course counts as a credit in the Management Studies Program.

The cohort will run from February until May in preparation for the June 2009 exam.

The fee is \$850 per person and includes facilitation, all study materials, conference calls and one exam sitting.

Registration is open now and closes January 20, 2009. For more information, visit www.cusource.ca and click on “Course Catalogue, Cohorts.”

Project Management Library

Now available on the CUSOURCE® Learning Management System, the Project Management Library is designed for team leaders and all employees who are interested in the principles and methodologies of project management.

The Project Management Library provides quality courses that range from beginner to advanced and are aligned to *A Guide to the Project Management Body of Knowledge* (PMBOK® Guide) published by the Project Management Institute (PMI®).

The library contains 17 curriculums with a total of 56 courses and eight simulations. Individual courses take between two and three hours to complete and can be accessed online at anytime.

The library prepares learners for a Certified Associate in Project Management (CAPM®) designation, a Program Management Professional (PgMPSMSM) designation and a Project Management Professional (PMP) designation, offered by the Project Management Institute (PMI). For more information on the PMI certification examination process and requirements, visit www.pmi.org.

Some of the perks included in this library:

Online Mentors

As learners are studying, any questions are answered by a PMI certified mentor 24/7. These expert mentors provide support, guidance and encouragement using real-time chats for quick questions (Monday – Friday, 9 am – 5 pm ET); and an “email my mentor” service (available 24/7) that makes technically detailed answers available for more in-depth questions.

Test Preps Exams

100 per cent mapped to the PMP exam, presents learners with the opportunity to test their project management knowledge in a simulated, certification-testing environment, as well as assess their overall project management knowledge. Feedback is also provided on areas that need improvement, and learners are directed to the courses where that information can be found.

PMP Express Guide

This online study guide provides a summary of all topics covered in *A Guide to the Project Management Body of Knowledge* (PMBOK Guide) and includes a glossary of key terms.



CUSOURCE Knowledge Network subscribers have access to the Project Management Library for an annual fee of only \$149 per person.

See the Project Management Library brochure for more information, or contact your Regional Office to enroll.

On the National Scene: September 2008 – December 2008

Month	Event/Activity
September 2008	
September 2008	<p>Ongoing Registration for:</p> <ul style="list-style-type: none"> • Cohort Fall 2008 session: <ul style="list-style-type: none"> - CU00-185 Products & Services - CU00-200 The Credit Union System - CU01-210 Consumer & Residential Mortgage Lending - CU00-240 Fundamentals of Personal Financial Planning - CU00-315 Strategic Management for CU Professionals - CU01-345 Commercial Lending • 315 Cohort Spring 2009 session • Supervisor Orientation to Member Service Representative Accreditation (online) <ul style="list-style-type: none"> - November 4 to November 25, 2008 session
September 8, 2008	CUIC® November 2008 exam registration starts
September 30, 2008	<p>Last day to register for Fall 2008 Cohort session:</p> <ul style="list-style-type: none"> - CU00-185, CU00-200, CU01-210, CU00-240 & CU01-345
October 2008	
October 6, 2008	<p>Cohort Fall 2008 session starts</p> <ul style="list-style-type: none"> - CU00-185, CU00-200, CU01-210, CU00-240 & CU01-345
October 13, 2008	CUIC November 2008 exam registration ends
October 22, 2008	<p>Last day to register for Supervisor Orientation to Member Service Representative Accreditation (online)</p> <ul style="list-style-type: none"> - November 4 to November 25, 2008 session
October 29, 2008	Deadline to withdraw without penalty - CUIC November 2008 exam
November 2008	
November 4, 2008	<p>Supervisor Orientation to Member Service Representative Accreditation (online) starts</p> <ul style="list-style-type: none"> - November 4 to November 25, 2008 session
November 19, 2008	CUIC Exam Date

On the National Scene: January 2009 – June 2009

Month	Event/Activity
January 2009	
January 1, 2009	CUIC® March 2009 exam registration starts
January 20, 2009	Registration ends for 315 Cohort Spring 2009 session
January 21, 2009	Registration starts for 315 Cohort Spring 2010 session
February 2009	
February 2, 2009	CUIC March 2009 exam registration ends
February 3, 2009	315 Cohort Spring 2009 session starts
February 12, 2009	Registration ends for Cohort Spring 2009 session - CU00-185, CU00-200, CU01-210, CU00-240 & CU01-345
February 13, 2009	Registration starts for Cohort Fall 2009 session - CU00-185, CU00-200, CU01-210, CU00-240 & CU01-345
February 13, 2009	Deadline to withdraw without penalty - CUIC March 2009 exam
March 2009	
March 2, 2009	Cohort Spring 2009 session starts - CU00-185, CU00-200, CU01-210, CU00-240 & CU01-345
March 5, 2009	Last day to register for Supervisor Orientation to Member Service Representative Accreditation (online) - March 18 to April 8, 2009 session
March 6, 2009	Registration starts for Supervisor Orientation to Member Service Representative Accreditation (online) - October 6 to October 27, 2009
March 18, 2009	CUIC Exam Date
March 18, 2009	Supervisor Orientation to Member Service Representative Accreditation (online) starts
April 2009	
April 17, 2009	CUIC June 2009 exam registration starts
May 2009	
May 15, 2009	CUIC June 2009 exam registration ends
May 29, 2009	Deadline to withdraw without penalty - CUIC June 2009 exam
June 2009	
June 17, 2009	CUIC Exam Date

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- **eMentor™**

Developed by the Risk Management Association (RMA), this online resource and mentoring tool is designed especially for commercial lenders to help them manage risk and make informed credit decisions.

Say It Out Loud

Is there something you would like to see in the next issue of in touch?

If you have any suggestions or would like to contribute information, please direct your comments to: info@cusource.ca