



September 2008

### MSR Start Series - Comprehensive, Cost-Effective Training

The MSR Start Series does include 6 online courses that explain the fundamentals of the job. But the Series is more than a collection of courses. Integral to this orientation *program* are:

- **A Manager's Guide:** Describes activities from "before the employee arrives" through the first-15 days on the job on beyond. Saves you time. Ensures a consistent approach for all new MSRs, build on the "See, Do, Learn" principle and can be used to enhance your existing orientation program or be the foundation for one.
- **Customizable Appendices:** Available in MS Word, this document includes 5 Appendices customize to your own credit union: a suggested Orientation Program, an MSR Evaluation Checklist, MSR Checkpoint Questions, preparation worksheet for a Product Knowledge Presentation.
- **An Employee's Guide:** Provides the employee with a plan for their orientation and development. Gives them a sense of direction, security and projects a positive image of their new employer.

To learn more, register in 1of 3 free national webinars being held in September and hosted by Michelle Manary who, working with credit unions, developed the Series. On the Learner homepage, enter "MSR Start" in the Catalogue Search field and click GO. Register in the Information Session of your choice.

### Commercial Lending - a Spectrum of Learning

CUSOURCE offers a variety of commercial lending *courses* (instructor-led, online and paper-based) and professional accreditation *programs*. Add to these RMA's *eMentor*<sup>®</sup> -- an online resource and research tool -- and you have an excellent foundation for developing your commercial lending bench strength. Some highlights:

**Commercial Lending (CU01-345):** Available in early September on the LMS. Employees can register for the self-study version of this online course or in a facilitator-led [cohort](#). Registration for the Fall cohort is open now; closes September 22<sup>nd</sup>. Class starts the week of October 6<sup>th</sup>. Modules 1 to 6 of this course are credits in the [Commercial Lending Administrator Accreditation Program](#); the full course is a credit in both the [Commercial Lender Accreditation](#) and [Management Studies](#) (MS) programs.

**Commercial Mortgage Lending (CU00-340):** The 4<sup>th</sup> paper-based edition will be available in September at a cost of \$450.00 (includes one exam sitting). The first exam on this revised material will be held in March 2009. CU00-340 is a credit in both the Commercial Lender Accreditation and Management Studies programs. More.....

**eMentor:** This online resource and mentoring tool from [Risk Management Association](#) (RMA) is used by commercial lenders across North America to help them assess and manage risk as well as mentor and develop newer

lenders. Canadian Central purchased a membership to RMA behalf of all if its member credit unions. As a result, access to *eMentor* is included in the value of a \$40 CUSOURCE subscription.

### The "Ideal" Business Account Manager Program

CBOS (Canadian Business Owner Strategy) has been working with CUSOURCE Knowledge Network, provincial Centrals and Canadian Central to create this new national program. The objective: to help you develop talent from within. This career development program will include comprehensive learning roadmaps as well as an **apprenticeship workbook** to support coaching and mentoring. CUSOURCE's learning consultant, Michelle Manary has been working with consultant Kevin Zakus, and the CBOS HR Sub-Committee to develop this program, to be unveiled at the [National Lending Conference](#) in St. John's, NL in early October. Who from your staff will be there?

### It's Not Too Soon. Register Now For:

**Fall Cohorts.** Registration closes September 22<sup>nd</sup>. Classes start the week of Oct. 6<sup>th</sup>.

**Note:** Please email the name(s) of any employee(s) interested in joining the **Commercial Lending Cohort (CU01-345-COHORT)** to your CUSOURCE Regional office.

### What's cool about cohorts?

- Participants pass their *CUIC*<sup>®</sup> course if their *combined* mark is 60% or more i.e., 10% participation; 30% assignments; 60% final exam.
- A subject expert keeps employees moving and motivated. [More](#)....

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NB: The [Strategic Management Cohort](#) (CU00-315) will run from February to May 2009. Registration is open now.

**Supervisor Orientation to MSR Accreditation (CU01-STSRACC)**: Recognizing and rewarding top performance in your MSRs, starts here with your MSR supervisors. After the 4 weekly i-meetings, supervisors have a thorough understanding of this prior learning assessment program and their role in coaching & mentoring their MSRs through the accreditation process.

[More.....](#)

Registration closes: September 22<sup>nd</sup>.  
Session dates: October 7 to October 28<sup>th</sup>.

**MSR Accreditation Logbook revised!** With input from a committee of credit unions dedicated to accrediting their MSRs, *CUSOURCE* has revised the MSR Logbook. Revisions make it easier to locate information; questions are clearer and for supervisors, additional information helps them determine if performance standards have been met.

### [CUIC November 19<sup>th</sup> Exam Session](#)

Registration period: September 8 - October 13.  
Deadline to cancel without penalty: October 29.

### **New Procedures for Exam Challenges**

*CUSOURCE* has always allowed experienced employees to challenge an exam as evidence of the knowledge they have acquired over time. Rather than purchasing the course material, they pay a \$200 Challenge Exam fee and register for the exam. For the November exam session, we are introducing a new procedure that requires individuals to apply to challenge an exam (except for MSR Accreditation, 225, 235, and 315).

Employees print and submit (fax, ideally) their completed Exam Challenge Application and support documentation to *CUSOURCE* by **September 30<sup>th</sup>**. Enter "exam challenge" in the Catalogue Search field. Click GO.

*CUSOURCE* will notify applicants within 5 business days of the decision. If accepted, *CUSOURCE* will enroll employees in the appropriate exam and site.

### [Credit Union Director Accreditation Exam](#)

*CUDA*® Program graduates who want to earn the "Accredited Canadian Credit Union Director" accreditation can write the qualifying exam on November 19th. The first exam was offered last November. As a result, the Canadian credit union system has 11 accredited directors. Working with Dalhousie University, *CUSOURCE* introduced this accreditation in response to requests from directors for a "higher level" of recognition. To help them prepare for the exam, *CUDA* Program grads can access a [Sample Exam](#) and can enroll in 2 *CUSOURCE Live* sessions that review 3 Level B workshops (Cluster 1) and the Management Recruitment workshop from Level B and audit and credit from Level C (Cluster 2). Cost: \$95 per participant/per session.

To register, login to the LMS. Enter "cuda-exprep" in the Catalogue Search field. Click GO.

Cluster1 offered October 28; Cluster 2, October 30 7:00 - 9:00 p.m. ET

### [This Fall, Watch For.](#)

Learning sessions on....

- Tax-free Savings Accounts
- Competencies (Assess) and Development Plans on the 7.6 LMS.

We'll share the details as soon as they are available.