

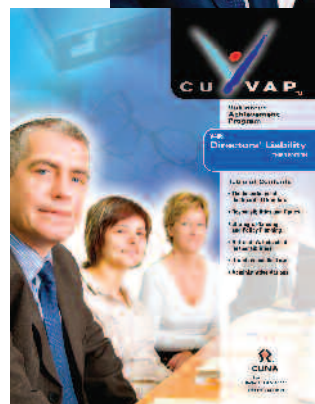
A guide for boards
and supervisory
committees

CUNA
volunteer
training &
certification

CUNA training adds **skills** across the **board**

As a credit union volunteer, education helps you do your job to the best of your potential — **it also improves your credit union's performance.** It's good for everyone, across the board.

Make sure you have all the up-to-date information to enhance your strategic planning and governing abilities. Make a solid, easy decision for your credit union's future; train with CUNA Volunteer Achievement Program (VAP) and Volunteer Certification Program (VCP). Use your VAP course training to earn your Certified Credit Union Volunteer (CCUV) designation.



100%
GUARANTEE

CUNA Center for Professional Development is committed to providing a quality learning experience with cutting-edge topics and expert instructors. If for some reason you are not fully satisfied, contact us and we'll provide you a full tuition refund or credit.

Experience Learning like never before with CUNA Center for Professional Development. For more than 40 years, we've helped people reach their personal and professional potential to maximize credit union performance. With training designed for credit unions by credit union people, our content is second to none and our business results help credit unions thrive. We deliver expert information, resources, and networking opportunities that inform and motivate staff and volunteers to deliver innovative ideas and exceptional strategies to your credit union. **Guaranteed.**

*Choose CUNA...
it's a decision that benefits everyone!*



VOLUNTEER ACHIEVEMENT PROGRAM

- **Convenience and affordability** — VAP's self-study, quick reading format allows each volunteer to complete the courses according to their own unique schedules. No travel time or expenses needed!
- **Instant exam results online** — Online exams through **CPD** Online offer 24/7 access and immediate scoring.
- **Recognition** — Volunteers will be rewarded for their efforts with certificates and pins honoring their achievements.
- **Easy-to-read books** — Course books are designed for easy readability.
- **Solid reputation** — CUNA offers years of proven credit union training and is widely recognized in the credit union industry.

VOLUNTEER CERTIFICATION PROGRAM

- **Certified Knowledge**
By earning your Certified Credit Union Volunteer (CCUV) designation you'll have the confidence, knowledge, and credentials of a credit union expert.
- **Guided Training**
The Board of Directors and Supervisory Committee Tracks have learning plans to direct your training to all areas of study that will help you gain comprehensive knowledge and skills.
- **Core Competencies**
Areas of study and credits are determined by research of which competencies help build the best credit union volunteer. With CUNA Volunteer Certification Program, you know you're building skills based on what credit union volunteers should know.

Visit **training.cuna.org** and
choose *Self-Study Certificate Programs*.


build strategic skills

VAP courses include a 50- to 100-page textbook with a 20-question, open-book final exam. The average study time per course is three to four hours.

BOARD OF DIRECTORS FUNDAMENTALS

- V100 Board of Directors: Duties and Responsibilities
- V101 Board Policies
- V406 Directors' Liability
- V411 Board Reports
- V412 Developing, Writing, and Implementing Policies

COMPLIANCE

- V410 Credit Union Examinations
- V416 Understanding Regulations
- V426 Bank Secrecy Act for Volunteers
-  V428 Understanding Audit Reports***

CREDIT COMMITTEE/LENDING

- V200 Credit Committee: Duties and Responsibilities
- V201 Loan Granting
- V202 Collections
- V407 Bankruptcy
- V423 Member Business Lending
- V600 Introduction to Mortgage Lending

CREDIT UNION FUNDAMENTALS

- V01 History and Philosophy for Volunteers*
- V02 Financial Reports for Volunteers*
- V03 Managing Risk for Volunteers*

* These courses are also offered through **CPD**Online.

FINANCE

- V409 Financial Management
- V415 Asset-Liability Management for Directors
- V424 Investment Essentials for Directors
- V425 Budgeting Basics for Directors

HUMAN RESOURCES

- V405 Board/CEO Relations
- V417 Assessing the CEO: Performance Appraisal and Goal-Setting
- V419 CEO Compensation

LEADERSHIP

- V414 Recruiting, Orienting, and Retaining Board Members
- V421 Political Involvement
- V700 Strategic Credit Union Leadership
- V701 Directing Effective Teams
- V702 Maximizing Board Performance

MARKETING

- V403 Marketing
- V413 Marketing to Generations and Target Groups
- V602 Offering Credit Union Youth Programs

Recognize your VAP learning achievements

A certificate and lapel pin are awarded upon completion of training milestones. Find out more at training.cuna.org, and choose *Self-Study Certificate Programs*.

Visit training.cuna.org and choose *Self-Study*


*** To be released in 2009.



PLANNING

- V102 Planning
- V404 Strategic Planning
- V418 Business Recovery Plans and Policies
- V420 Credit Union Growth Strategies: Pathways to Success
- V422 CEO and Board Succession Planning

SUPERVISORY COMMITTEE

- V300 Supervisory Committee: Duties and Responsibilities
- V301 Auditing 1
- V302 Auditing 2
-  V427 Basics of Internal Control***

SUPERVISORY COMMITTEE II

- V303 The Supervisory Committee's Role in Due Diligence**
- V304 The Supervisory Committee's Role in Finding Fraud
- V305 The Basics of Risk Assessment for Volunteers

** V303 is a free PDF course.
Take the exam to earn recognition.

TECHNOLOGY

- V500 Credit Union Technology
- V501 Planning for Technology
- V502 Electronic Fraud and Security
- V601 Online Policies and Internet Use

Ordering VAP is easy!

■ Print-Based Courses and Exams

To purchase print courses and exams, select the option below based on your league affiliation.

Credit unions in the following states can order by calling CUNA Member Services at 800-356-8010, press 3.

- Alabama
- Iowa
- North Carolina
- Alaska
- Louisiana
- Ohio
- Arizona
- Maryland
- Oklahoma
- Arkansas
- Massachusetts
- Pennsylvania
- California
- Michigan
- Rhode Island
- Connecticut
- Mississippi
- South Carolina
- District of Columbia
- Montana
- Texas
- Georgia
- Nevada
- Utah
- Hawaii
- New Hampshire
- Virginia
- Illinois
- New Mexico
- Wisconsin
- Indiana
- New York

All other states can order by contacting your League's education department.

■ Online Exams

VAP offers users the opportunity to complete exams online. Online exams are cost-effective and offer immediate scoring.

VAP Online Exam: \$24.50 each

Take online exams at training.cuna.org by choosing **CPD Online**.

Questions about VAP

E-mail training@cuna.coop, or call 800-356-9655, ext. 4072

Experience CPD Online

CPD Online offers more than 300 credit union-specific courses designed to help the learner "experience learning" through interactive learning and follow-up testing. Online courses are offered in a variety of topics to meet all training needs. Our learning management system provides tracking and reporting capabilities, an assessment tool, course management tools, and more!

CPD Online Courses: \$35 each
Exams: \$15.50-\$29.50 each

Multiple membership for course and exam access are available with CPD Online. Memberships include unlimited course access, webinar discounts, a learning management system, access to all competency assessments, and more!

Small credit union discounts are also available.



For more information, e-mail cpdonline@cuna.coop, call 800-356-9655, ext. 4072, or visit training.cuna.org and choose **CPD Online**.

Certificate Programs.

VCP VOLUNTEER CERTIFICATION PROGRAM

- Guided training
- Core competencies
- Certified knowledge

CCUV...the credentials behind every good credit union volunteer.

Earn your designation as a Certified Credit Union Volunteer with the CUNA Volunteer Certification Program.

You deserve all the recognition in the world for volunteering to direct a credit union. Members rely heavily on credit unions for their financial security, and your decision to volunteer is to be applauded.

It's also a responsibility you can't take lightly.

In a financial world that grows more complex each day, you need an advanced understanding of the issues affecting your credit union. From daily operations to board governance, your ability to understand and analyze issues is critical.

That's a big responsibility for a volunteer, which is why CUNA created the Volunteer Certification Program. This program is designed to create a simplified approach to some rather complex subjects. It will provide you with a convenient, practical way to become certified in the areas of credit union operations, governance, compliance, and more. Plus, through your studies you'll earn your credentials as a Certified Credit Union Volunteer (CCUV).

Volunteers can choose from two training tracks. If you're uncertain which area is ideally suited for your volunteer efforts, we'll help you select the right track and courses.

BOARD OF DIRECTORS TRACK

Includes oversight of entire credit union operation and strategic planning.

Areas of Study

- Safety and Soundness
- Governance
- CEO Oversight
- Board Operations & Development
- Strategic Planning

SUPERVISORY COMMITTEE TRACK

Includes audits, risk assessments and other credit union issues.

Areas of Study

- CU Knowledge & Committee Governance
- Annual Audit Requirements
- Risk Assessments/Audit Plan
- Internal Audit
- Board Operations & Development

PREREQUISITES

You must successfully complete the exams for the following three Volunteer Achievement Program (VAP) courses: V01History & Philosophy, V02 Financial Reports, and V03 Managing Risk.

TWO TRAINING FORMATS TO CHOOSE FROM:

To become a Certified Credit Union Volunteer (CCUV), you may choose from two methods of training:

1. CUNA Volunteer Certification School

Volunteers who prefer the traditional setting will opt for this week-long training session. It includes knowledge and discussion sessions that culminate with five certification exams.

For more information, visit training.cuna.org and choose *Schools & Conferences*.

2. Self-Directed Study

For volunteers who prefer to learn on their own, the self-directed option allows you to choose learning activities from a list of options.

Enroll in the self-directed study, and begin your coursework today. Visit training.cuna.org or submit the form on page 7.

There is no time limit for completing the CCUV designation. Once enrolled, you must complete at least three credits annually for your enrollment to remain active. If there is no activity for one year, the enrollment fee is forfeited and re-enrollment is required.

For more information:

- Visit training.cuna.org
- E-mail training@cuna.coop
- Call 800-356-9655, ext. 4139

BOARD OF DIRECTORS AREAS OF STUDY	TOTAL CREDITS NEEDED	LEVEL I CREDIT OPTIONS	LEVEL 2 CREDIT OPTIONS
Safety and Soundness	16	Choose a maximum of 6 credits.	Choose a minimum of 10 credits.
Governance	12	Choose a maximum of 4 credits.	Choose a minimum of 8 credits.
CEO Oversight	10	Choose a maximum of 4 credits.	Choose a minimum of 6 credits.
Board Operations & Development	10	Choose a maximum of 4 credits.	Choose a minimum of 6 credits.
Strategic Planning	12	Choose a maximum of 4 credits.	Choose a minimum of 8 credits.
Total	60	Up to a maximum of 22 credits.	A minimum of 38 credits is required.

SUPERVISORY COMMITTEE AREAS OF STUDY	TOTAL CREDITS NEEDED	LEVEL I CREDIT OPTIONS	LEVEL 2 CREDIT OPTIONS
CU Knowledge & Committee Governance	16	Choose a maximum of 6 credits.	Choose a minimum of 10 credits.
Annual Audit Requirements	12	Choose a maximum of 4 credits.	Choose a minimum of 8 credits.
Risk Assessments/ Audit Plan	10	Choose a maximum of 4 credits.	Choose a minimum of 6 credits.
Internal Audit	12	Choose a maximum of 4 credits.	Choose a minimum of 8 credits.
Board Operations & Development	10	Choose a maximum of 4 credits.	Choose a minimum of 6 credits.
Total	60	Up to a maximum of 22 credits.	A minimum of 38 credits is required.

Visit training.cuna.org for additional training opportunities added frequently including:

	Level	Credits	Area of Study
Schools and Conferences	2	varies	varies
Pre-Conference Workshops	2	varies	varies
Conference Breakout Sessions	2	3	varies
Webinars	2	3	varies
Books	2	4	varies
VAP Courses	1	2	varies
Training On Demand Titles	1/2	2/3	varies
White Papers	1	2	varies
Filene Reports	1	1	varies

Credits and learning activities subject to change at anytime; visit training.cuna.org for the latest information.



FOR MORE INFORMATION:

- Visit training.cuna.org
- E-mail training@cuna.coop
- Call 800-356-9655, ext. 4139

Learn more and enroll today for just \$100 at training.cuna.org and choose *Self-Study Certificate Programs*.

PROGRAM ENROLLMENT FORM

Please type or print and complete all sections.



PERSONAL DATA

Name _____	_____	_____	_____
	Last	First	Middle initial
Street address _____			
City _____		State _____	Zip _____
Telephone (_____) _____		E-mail address: _____	

CREDIT UNION DATA

Credit union name _____			
CUID# _____			
Street address _____			P.O. Box _____
City _____		State _____	Zip _____
Current volunteer position _____			
Telephone (_____) _____		E-mail address: _____	

PREFERRED CONTACT

How would you like for us to contact you?

CU address Home address

TRACK CHOICE

CUNA Volunteer Certification Program Track:

Board Track Supervisory Committee Track

PAYMENT

No need to prepay. We'll invoice your credit union for the \$100 enrollment. Total program cost is determined by the learning activities you choose.

AFFILIATION

Are you an employee or volunteer of an affiliated credit union, a league that is a member of CUNA, U.S. Central or its member corporates, CUNA, or World Council of Credit Unions?

Yes No

PREVIOUS CUNA COURSES

Have you taken any previous CUNA course credits (ex. VAP courses) which you would like transferred into this program?

Yes No

(Only programs/courses which include assessments (exams) and reported on your CUNA transcript will be considered for transfer. Credit transfers will be limited by CUNA Volunteer Certification Program requirements.)

MAIL: CUNA Volunteer Certification Program, P.O. Box 431, Madison, WI 53701-0431

FAX: CUNA Volunteer Certification Program, 608-231-4253

ENROLL ONLINE: training.cuna.org and choose *Self-Study Certificate Programs*

Source Code: BR



Your Trusted Resource for Credit Union Success™



Please make photocopies of all forms as needed.

It's the most . convenient training you will ever use!

Download the training you need, and then complete each course when it's convenient for you. With each CUNA Training on Demand topic you'll:

- Download the course immediately when you place your order
- Save it to your computer, CD, or USB drive
- Use the training here, there, and everywhere you have access to a computer
- Learn about important credit union issues in 30-45 minutes
- Reinforce your knowledge with printable workbooks and optional testing
- Use the training again and again



TRAINING ON DEMAND TITLES FOR CREDIT UNION VOLUNTEERS INCLUDE:

- 10 Ratios Every Volunteer Should Know
- A Board Governance Approach: What to Do When Things Go Wrong
- Assessing the CEO
- Bank Secrecy Act for Volunteers
- Business Continuity Planning for Volunteers
- Communications Strategies for High Performing Volunteers
- Credit Union Growth Strategies
- Effective Governance: An Overview
- How to Think About Strategic Planning
- Local Involvement: Marketing Strategy and Community Benefit
- Overseeing the Annual Audit by Outside Parties
- So, You Have a Community Charter... Now What?
- The Basics of Internal Controls
- The Basics of Risk Assessment
- The Directors' Role When Complaints are Filed Against Senior Management
- The Supervisory Committee's Role in Finding Fraud
- The Volunteer's Role in Managing 3rd Party Relationships
- Understanding the Audit Report
- Volunteer Self-Evaluations
- What the CU Volunteer Needs to Know About Harassment in the Workplace

Visit training.cuna.org and
choose *Training on Demand*.



Credit Union National Association

PO Box 431 | Madison, WI 53701-0431



CUNA volunteer training & certification

Here's your
guide to CUNA's
Volunteer Achievement and
Volunteer Certification Programs.

Visit training.cuna.org