



Check It Out!

Volume 4, Issue 1

CUCBC Information Centre newsletter

January 2005

May we help?

This quarterly newsletter is designed to help familiarize you with the services offered by the Corporate Information Centre at Credit Union Central of British Columbia, and those of other Central departments -- services which are available to all staff and directors of BC credit unions, Central and related organizations.

The **Information Centre's** collection of books, reports, and other materials is a resource for the B.C. credit union system. Take a look at the collection overview to see if it can be a resource for you.

Whether you work at Central or a credit union, the **Operations Policies and Procedures** department helps make your work easier. Find out how in the Spotlight section on page 2.

Reading is a part of each of our work lives, but it should be part your home life too - particularly if you have young children. On page 4, read all about **Family Literacy Day**.

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Info in the Information Centre

The Corporate Information Centre's collection of materials has been gathered over the past three decades. New materials are added to the collection regularly, and the collection is reviewed and weeded annually. The collection consists of ...

- **Business related books** – everything from “old favourites” such as The Seven Habits of Highly Effective People, published in 1989 to Covey's newest book, The 8th Habit. New additions to the collection are featured in the monthly “Book Ends” page, appearing in the *Central Notes* newsletter. Using the electronic catalogue on InfoCentre Online, at <http://infocentre.cucbc.com>, you can search for titles, authors or subjects, and place an electronic request for any items of interest. A link on the search screen will display the most recently catalogued items in the collection.
- **Reports and studies** – with so many materials available electronically now, it can be hard to keep track of them all. In the Information Centre, we print out important documents and either add them to our catalogued collection, or keep a copy in our extensive Subject File collection.
- **Newsletters and magazines** – the periodical materials in the Centre collection are available for routing or loan. For details, see the Periodicals section of InfoCentre Online.
- **Audiovisual materials** – a small collection of audiovisual materials are available for loan. Search for them in the electronic catalogue on InfoCentre Online, by typing “video” into the Title field.
- **Credit union materials** – approximately 5 years of annual reports and newspaper clippings for all B.C. credit unions are kept on site. Older materials are in offsite storage and can be retrieved, upon request.

Need more info? Please just call (604) 737-5971, e-mail infocentre@cucbc.com or investigate the Centre website.

Spotlight on...

Operations, Policies and Procedures

The Operations Policies and Procedures Department, established over 30 years ago, is responsible for providing credit unions with the model policies, procedures, and forms needed to run a credit union within prescribed best practices and standards required by law. Back in the days before there was an actual department, trainers, referred to then as Field Reps, would travel to individual credit unions and assist them in implementing procedures in a standardized way.

The Operations Policies and Procedures Department today is made up of a team of six people, who research, write, edit, and publish print and online versions of a 10,000 page Operations Manual and create and maintain a library of over 1,000 forms and documents. The online version of the Manual, and the Forms and Document Library have search engine functionality which allows credit union employees to quickly locate policies and procedures, and forms and documents by keyword(s).

Operations Manual

The Operations Manual is a 33-volume set of policies, procedures, and forms divided into four subsets: Administration, Lending, Member Services, and Payment System.

The Manual serves many purposes, including: providing reference and procedural material for credit union staff; providing support for new financial products and services; standardizing procedures and forms so that credit union members are treated equally and consistently; providing credit unions with procedures for using Central services, such as Payment Services; provides auditing and performance standards; reducing audit costs; ensuring all credit unions comply with legal requirements; and reducing legal and research costs for the system by centralizing these activities.

Copies of federal and provincial statutes are not provided in the Operations Manual due to cost considerations and difficulty of maintaining up-to-date versions. Brief summaries of the relevant provision of many statutes are available within the individual Parts (search for Legal Considerations).

and much of the content in the policies, procedures and forms throughout the Manual has been reviewed by lawyers. The Operations Policies and Procedures Department absorbs a six figure legal bill every year, and that's about five times as much as the department spends on printing. British Columbia has the strongest credit union system in English-speaking Canada, so it's appropriate that we have the most comprehensive Operations Manual in the country.

Forms and Documents

The most recent forms and documents are available in the online Forms and Documents Library, and updates are systematically integrated into all relevant areas of print and online versions of the Operations Manual on an ongoing basis. Forms and documents are developed and updated in response to legislative changes, credit union requests, or development of new products and services.

Forms include membership applications, account agreements, mortgage documents, loan agreements, security agreements, term deposit receipts, and many more. Documents include model policies, internal audit programs, quick reference tables, sample letters, and the like.

All forms and documents are provided in electronic format (i.e. PDF or Word). Many forms are interactive: they contain enterable fields and perform automatic calculations — features designed to ease the workload of front-line credit union staffers.

Other Products and Services

The Operations Policies and Procedures Department also produces Central's internal manuals (e.g. Employee Policy Handbook, the Corporate Manual, and the Administration Manual), as well as manuals for client departments (Risk Management Manual) and Director's Guides.

For more information, contact Beverly Dunne, Manager, at (604) 737-5016, or Heather Jones, Supervisor, Manuals Production, at (604) 737-5989.

Hot topics: Conducting surveys

Member and employee satisfaction surveys can be very useful tools. But good surveys require a lot of work, and in some situations are not the right tool to use to get the information you need. If you are considering conducting a satisfaction survey, start by thinking about...

- ✓ What are the objectives of your study? Can you phrase these objectives as questions or measurements? If you can't, don't start.
- ✓ Decide what you want to determine or measure - If the questions aren't answerable, or the parameters aren't measurable, don't start.
- ✓ Know what "population" you are studying and pick a reasonably representative and appropriately-sized sample of that group.

If an electronic survey would be appropriate for your situation, you might want to consider conducting a simple survey using a web-based survey product such as Survey Monkey (www.surveymonkey.com) or Zoomerang (www.zoomerang.com). This type of product makes it easy to construct a basic survey with lots of design options, and providing a variety of ways to view the results, at a very modest cost.

For background reading on conducting surveys, take a look at the following resources ...

WEBSITES ON SURVEYS

- *Questionnaires and Surveys* – A free tutorial, developed by StatPac Inc. Learn to design your own questionnaires and surveys, while mastering the concepts of their design -- <http://www.statpac.com/surveys/index.htm#toc>
- *Survey & questionnaire design tips* – A web resource that discusses options and provides suggestions on how to design various surveys . Surveys for e-mail, paper, telephone and the web are discussed along with the pros and cons for each -- <http://www.surveysystem.com/sdesign.htm>
- *Questionnaire design and analysis* – An indepth online workbook that will walk you through everything aspect of designing a survey, and then analyzing it -- <http://www.tardis.ed.ac.uk/~kate/qmcweb/qintro.htm>

ELECTRONIC ARTICLES ON SURVEYS

- “Methods and Guidelines to Avoid Common Questionnaire Bloopers”, Chauncey Wilson, *Usability SIG Newsletter*, January 2003. A set of methods and principles that will help you avoid the most common questionnaire bloopers -- <http://www.stcsig.org/usability/newsletter/0301-surveybloopers.html>
- “Creating Effective Online Surveys: Owning Photoshop doesn't make you an artist”, Kath Straub, *Human Factors website*, Jan. 2005. A look at what is required to make an online survey an effective data gathering tool -- <http://www.humanfactors.com/downloads/jan04.asp>
- Visit the Electronic Articles page on the Corporate Information Centre's website for three more articles on surveys - <http://infocentre.cucbc.com/electronicarticles.shtml>

Family Literacy Day- January 27

Learning is a Family Affair – Schedule some family time to read with your children every day. Help them become good readers and good learners!

Family Literacy Day is a national event created by ABC CANADA (<http://www.abc-canada.org/flid-jaf/>) to promote the importance of reading and learning together as a family.



Literacy tips for parents from (www.westernwheel.com)

- Make everyday a learning day -- read the cereal box at breakfast, have an alphabet supper or lunch (Alphagetti, alphabet soup, etc).
- Make every place a learning place -- for kids and families on the go create a travel kit of books, magazines, pencils and paper for the car; learn or make up songs and rhymes in the car; prepare a literacy bag for the little ones at their siblings' sporting events; have magazines and books in the bathroom, kitchen, trailer, car, etc.
- Create a special place for your children and their books -- books can be found at garage sales, second hand book stores and book fairs at a low cost; buy your teens magazines.
- Literacy and learning is a family affair and it can be fun, read to and with your children -- don't stop because they can read; talk together, tell stories, ask questions, listen.
- Use the internet to look up places you would like to go on a fantasy holiday; go to the local museum, library or park.
- Read just for the fun of it.

Contact us – please!

The Corporate Information Centre is here to assist you in working for your credit union's success. Here's how you can reach us...

Credit Union Central of British Columbia

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2nd floor, near the stairs

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A two-page Information Centre services overview is available, in print or on the Centre website. Check it out!

To request a copy of the services overview or information about any Centre service, just e-mail infocentre@cucbc.com.