



# UPDATE

AN ELECTRONIC REPORT FROM THE CUNA HUMAN RESOURCE COUNCIL

## CHAIR'S MESSAGE

*Gayle Rust Gustafson, VP, Selco CU, Eugene, OR*

1999—what a year to be elected Chair of this awesome organization. I'm honored and ready to serve you. It's an exciting time, full of challenges and opportunities for us all and for our credit unions. Y2K. We are undoubtedly equally deep in contingency and business resumption planning. If my wish comes true, all these plans will just turn out to be fabulous disaster recovery plans that we'll be prepared for and will never need.

The Executive Committee had a productive planning session before the Conference in April. I'd like to share some of the key initiatives we'll be engaged in this term:

- We will see further development and training in the *Career ExCELL<sup>SM</sup>* product. This system is unsurpassed for defining required skills and competencies in each functional area of a credit union. When used in conjunction with the leadership competency cards in the Lominger system, it is a very powerful HR and training tool. (Please also see the in-depth article later in this newsletter).
- We have just introduced the on-line threaded discussion forum. Housed on the CUNA web site under the HR Council is a site for posting any HR issue about which

you want to seek ideas or advice from others. Take advantage of the wisdom of others, and share your own. The secret to success for this service being a great Council benefit is using it! Pop back in any time to see the latest postings to your and others' topics. Let's populate this with timely and useful information now!

- A new undertaking for us to research is an on-line recruiting source. It would be a national source for posting credit union jobs open and for job seekers to list positions wanted. Initial responses have been extremely positive, given our intent to be a much lower cost alternative than the national on-line recruiting sources available now. This would be a joint Council benefit, lead by the HR Council.
- Another focus this year will be providing information and training resources for Intranet development. An Intranet, blending HR/Training, Technology and Marketing, is a tool we'll someday wonder how we lived without!

Please invite your HR colleagues at other credit unions to join the CUNA HR Council. As you are networking at conferences, League events, and other places, remember to mention the benefits of being a Council member. It will make us a stronger organization, and enable us to provide more benefits to you and all Council members. Thank you! ♦

## HRC Summit 2000

◆  
April 12 - 15  
San Antonio, TX  
◆

Get it in your 2000  
budget and on your  
calendar today!

## HR CONFERENCE HITS ALL THE MARKS

It may have been San Diego's balmy weather or the hotel's seaside ambience on Mission Bay, but the fifth annual CUNA HR Council HR Summit attracted the highest ratings of any HR Summit to date. Of the 16 professional speakers on hand to share their views, 14 scored 4.0 or more on a 5.0 scale and 11 received top marks of 4.5 and above.

"The HR Summit is an awesome way to participate in an energetic group of HR professionals," said one participant evaluation.

"Excellent conference, agenda, location, people, speakers. And the networking opportunities—WOW!" said another.

This year's sessions hit all the marks when it came to those topics critical to credit union HR professionals' needs: legal updates, best HR practices, management and supervisory development, succession planning and compensation, to name a few. There was even a

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groundbreaking teambuilding session that introduced participants to the three T's of future HR management: teams, training and technology.

What follows are highlights from this year's

HR Summit. For a summary conference evaluation and photos, see the council Web site at [www.cuna.org](http://www.cuna.org). Click on the "Councils" button, then the CUNA HR Council. ♦

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## EMPLOYEE RETENTION REQUIRES GOOD HIRING PRACTICES

*Mike Muckian, director, CUNA Councils,  
CUNA & Affiliates, Madison, WI*

Credit unions can build a winning staff through careful employee selection, training, and treatment. Of those, selection is the most critical, says Harris Plotkin, president of The Plotkin Group, Carlsbad, Calif.

What's more, Plotkin told 145 attendees at the CUNA HR Council HR Summit in San Diego Thursday, careless hiring practices can err on the positive as well as on the negative side. "Employers hire too many tigers,"

Plotkin said. "If there are not enough places for them to move up, they will move out."

Good hiring practices match employees to the organization and position based on aptitude and attitude, rather than skills and experience, Plotkin advised. "Most of our jobs are not rocket science. We can learn what we need to know," he said. "But behavior comes from attitudes, and attitudes derive from values. You can't teach employees values."

Once hired, compensation, perks, and bonuses are not the most critical factors to keeping good staff. Creating a positive work environment is the most important factor. "Good employees will always find other opportunities, no matter what the economy is like," Plotkin said. "Those are the people you want to keep." ♦

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## LOW UNEMPLOYMENT MEANS COMPETITION FOR WORKERS

*Jim Jerving, CUNA's manager of educational resources  
and print products, CUNA & Affiliates, Madison, WI*

Unemployment is 4.2%—the lowest in 29 years. It means credit unions may be losing their more talented people, according to Tom Glatt, president of Counter Intelligence Associates, San Juan Capistrano, Calif.

Take tellers, for example. They're important front-line employees, but their turnover each year ranges from 40% to 60%. Banks know credit unions do a good job of training tellers, especially in soft skills, such as communication. So banks hire them away, said Glatt at the

CUNA HR Council's HR Summit in San Diego last week.

Why do people quit their jobs? Glatt pointed to a Labor Department study for his answer. Historically, the first reason is the immediate supervisor, followed in order by lack of personal recognition, lack of corporate support, benefits, and salary.

In 1998, however, people quit their jobs for different reasons:

The number one reason was compensation, salary and benefits, followed by lack of challenge and lack of personal growth, immediate supervisor, lack of recognition, and lack of corporate support.

And Glatt noted there's a big difference between older workers, who take pride in working at the credit union, and younger workers, who often are in it for the money. ♦

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## HRC Election Results

Please welcome and congratulate those elected and re-elected(\*) to the CUNA HR Council Executive Committee:

Mark Brennan\*, VP - HR & Training, US Airways FCU, Pittsburgh, PA,

Todd Surline\*, VP - HR, Michigan State University (MSU) FCU, Lansing, MI,

And Linda Stevenson, SVP - HR, Omni American FCU, Fort Worth, TX.

All three were elected to serve three-year terms.

In addition, our newly appointed league rep-

representative is Cathleen Slone, Technical Information Consultant, Missouri Credit Union League, St. Louis, MO.

The HRC appreciates all members that have come forward to serve their fellow credit union HR professionals. ♦

## THE SECRET OF LEADERSHIP

Leadership. It's a word often overused but rarely understood. What does it take to develop leadership within the credit union industry? Moreover, in conjunction with the new emphasis on technology, is it as important as it once was?

Today, leadership is more important than ever. It doesn't matter if you're talking about staff leadership of today's changing workforce or taking the lead in directing the technology that's overtaking your credit union operations. Leadership skills are critical and their application universal. Developing those skills will mean the difference between success and failure in the new millennium.

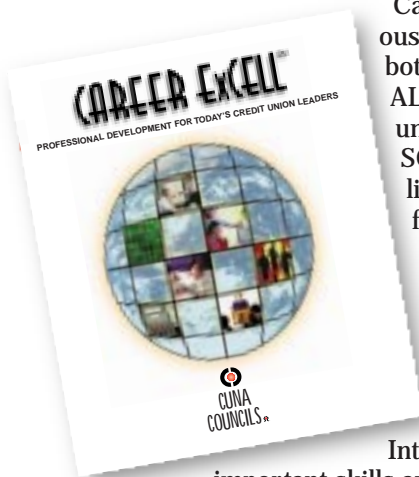
The CUNA HR Council, in conjunction with the other five CUNA Councils, has

joined with Cleveland-based consultants The Cardwell Group to create *Career ExCELL*<sup>SM</sup>. It's a new methodology by which you can help determine the core competencies critical to your professional development and career growth.

*Career ExCELL*<sup>SM</sup>, a selection of traits for each of the council disciplines bound into its own notebook, can be used in conjunction with the *Lominger Career Architect* series, produced by Minneapolis-based Lominger Ltd., to measure credit union professionals core competencies and leadership skills. Both products, taken together, will tell you what you need to know about your job and specifically where you stand. ♦

## 12 WAYS TO USE CAREER EXCELL<sup>SM</sup>

Jim Cardwell, President, The Cardwell Group, Cleveland, OH



Career ExCELL offers numerous opportunities for usage both at the ORGANIZATIONAL level within your credit union, as well as the PERSONAL level in your own life. Here are 12 great ideas for both aspects.

### ORGANIZATIONAL Recruitment

Use *Career ExCELL* to prepare meaningful position profiles. Write competency-based ads.

Interview candidates on important skills and know-how. Pick the right people for the right reasons.

### Career Pathing

Define basic, intermediate and advanced skills within each functional area. Clearly

identify career progression and pathways. Develop meaningful succession plans.

### Development Planning

Prepare development plans that contain a common language. Positions within your organization will be defined against those used throughout the industry. Truly benchmark development.

### Coaching

Provide a framework for defining "role model" skill sets. Efficiently direct career development. Build a productive coaching focus.

### Counseling

Quickly pinpoint where skill deficiencies exist. Implement improvement strategies and progressive discipline.

### Organization Design

Use the competencies to layout your new organization. This tool will help ensure that you have not left anything out. It will also provide an easy way to creatively combine functions.

### Role Definition

Accurately design and clearly communicate role expectations.

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**Accountability**

Well-developed role expectations will improve accountability and productivity. They will also increase the focus on outcomes rather than activities.

**Assessment**

Utilize this competency-based approach to identify the strengths and gaps within your team.

**Performance Feedback**

Set meaningful expectations and provide meaningful feedback to both novice performers and seasoned pros.

**Recognition/Reward**

Utilize *Career ExCELL*<sup>SM</sup> to identify the elements of a competency-based pay system.

**Strategic Planning**

As you examine the strategy of your organization, anticipate the skills required for success. Build them early. Be prepared for your future!

**PERSONAL****Recruitment**

Beat the competition by being well prepared. Do your homework for interviews. Review the competencies needed to perform the job. Fine tune your resume and rehearse probable interview questions.

**Career Pathing**

Now you can easily identify the competencies needed to grow within your own field. You can also plan how to move into broader responsibilities.

**Development Planning**

Better awareness of your career path will help you zero in on highly productive areas for personal development

**Coaching**

Sit down with a functional expert and talk through the specific competencies you wish to develop. Build perspective. Identify projects and coursework that will accelerate your learning.

**Counseling**

Learn from mistakes. Review competencies to identify missing skills or bases you did not touch.

**Organization Design**

Provide valuable input into the design of your organization. Identify the strengths that can be deployed by you and others.

**Role Definition**

Efficiently define the roles of those within your department. Design jobs that will blend personal goals with organizational objectives.

**Accountability**

Use the competencies to build a mutual agreement on performance expectations. Clearly let your employees know what you expect.

**Assessment**

Simplify assessments by employing a competency-based approach. Quickly pinpoint the strengths and areas for development in each of your direct reports.

**Performance Feedback**

Give meaningful feedback to your people. Help them understand where they are excelling and where they are falling short. And show them where they can build for their future to make themselves (and your department) stronger.

**Recognition/Reward**

Learn the value that each competency has in your career. Use demonstrated know-how to build recognition and reward.

**Strategic Planning**

As you examine the strategy of your organization, anticipate the skills required for success. Build them early. Be prepared for your future!

*Career ExCELL*<sup>SM</sup> is now available! It's a professional development product you won't want to pass up. In a world where increased leadership skills will be crucial to your professional development, *Career ExCELL*<sup>SM</sup> is the most critical credit union resource available.

To order, call 1-800-356-8010, Extension 4157. Ask for stock # 22420 (*Career ExCELL*<sup>SM</sup> only); price is \$199 for CUNA HR Council members, \$299 for non-CUNA HR Council members. For *Career ExCELL*<sup>SM</sup> plus the Lominger card deck, ask for stock #22458; price is \$249 for CUNA HR Council members and \$359 for non-CUNA HR Council members. Shipping and handling will be added at the time of ordering. ♦



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