



CUNA
HR & ORGANIZATIONAL
DEVELOPMENT COUNCIL

Empowering Leaders and Staff

March 29, 2018



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Belong To Something Special

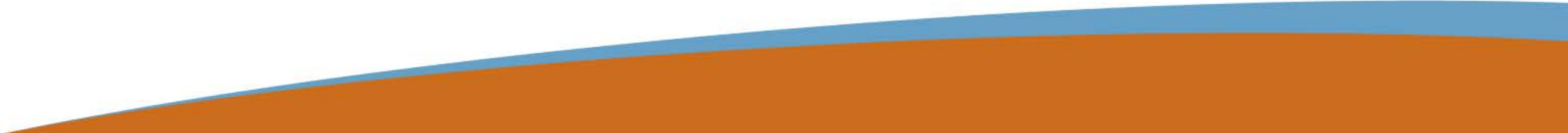
Julie Irby

Training and Development Coordinator

Creating Leadership Training from Scratch

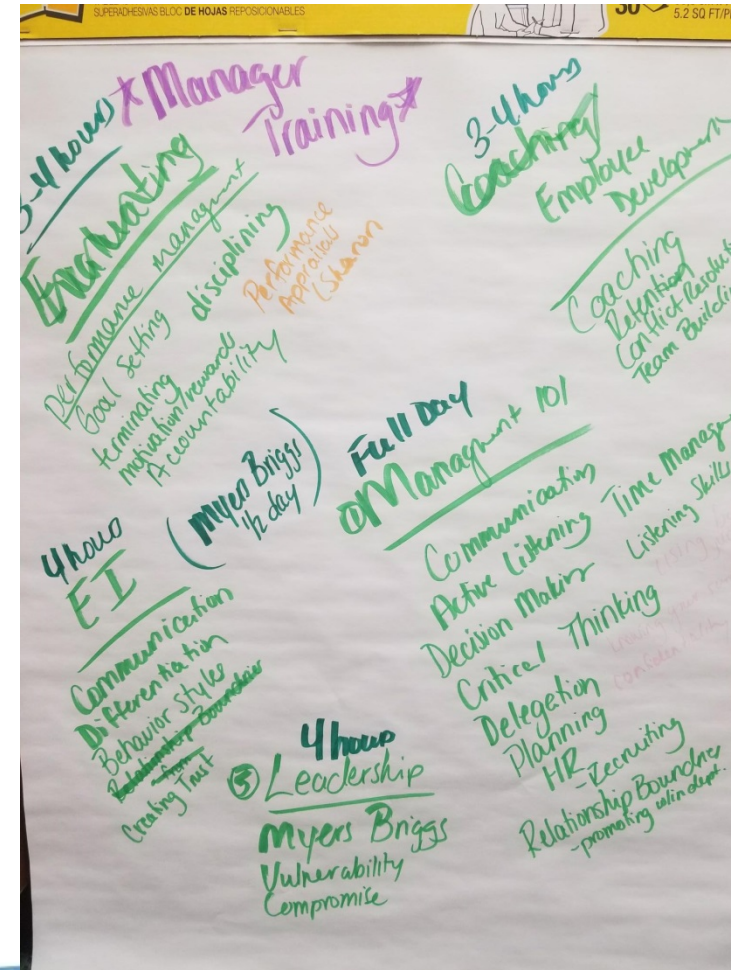


Assessment

- What are five main responsibilities of your job? List the approximate percent of time you spend on each job responsibility?
 - What competencies (skills / abilities) do you require to be successful in your job?
 - What are the critical success factors for your effective performance?
 - What are the main barriers to your success?
 - What are the most difficult aspects of your job?
 - What should the training priorities for your job function be?
 - What prior management training have you received? List all training received, including training received in previous jobs.
 - What is your preferred learning style (self-paced, computer based, classroom)?
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Brainstorming

- What core competencies are important to instill in managers at Freedom?
- Resources for new and existing managers: mentors? Resource guides?
- Lay out of training: how many days, length?



S.A.I.L. Training- 6 Modules

- Kick off- Strengths Finder
- Management 101
- Employee Development
- Performance Management
- Emotional Intelligence
- Leadership



L.E.A.D Training- 3 Modules

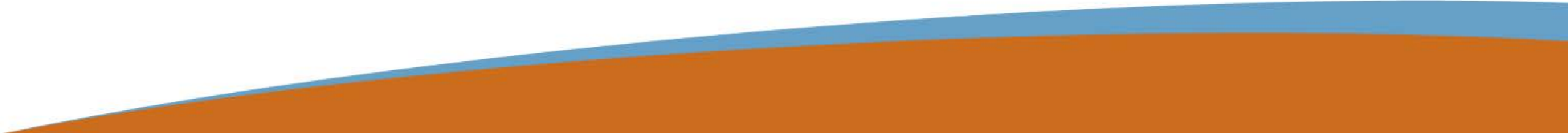
- Strength Finder
- Employee Development
- Leadership



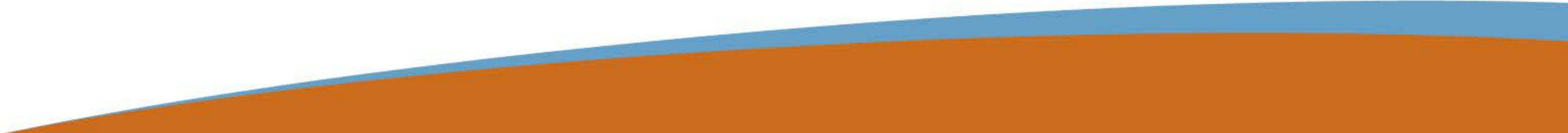
Re-Assess

- Employee Engagement Survey

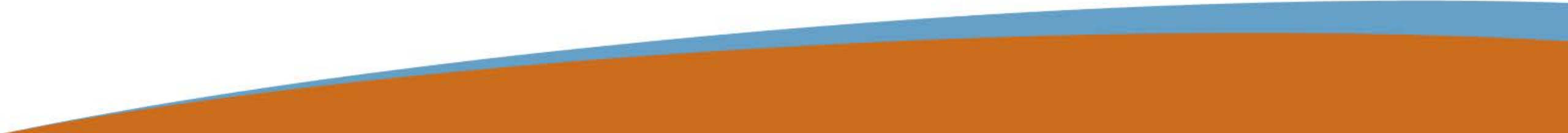
In-Touch Program

- 6 week program
 - Visit each department of the CU one day a week
 - Last day- Recap and follow up
 - All employees
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What are banks doing?

- Bringing in local Community Colleges for professional development classes.
 - Bring in offsite trainers to conduct assessments- Expensive!
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What are banks doing?

- Leadership Training
 - Assigning Mentors
 - 1 Year Course
 - Team Building
 - Presentation Skills
 - Project Management Skills
 - Professional Appearance
 - Learn Key Areas with in the Bank
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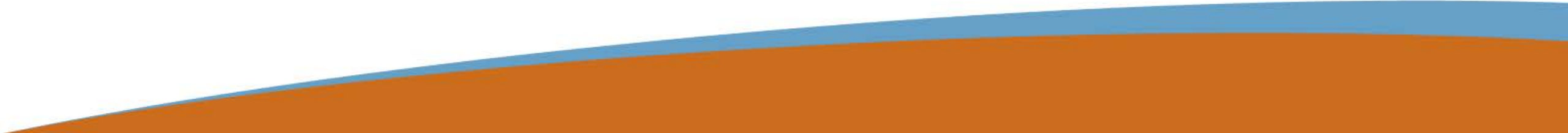


Leadership and Culture are the Foundations


Deborah L. Sparrow, SVP/CLO

Maine State Credit Union

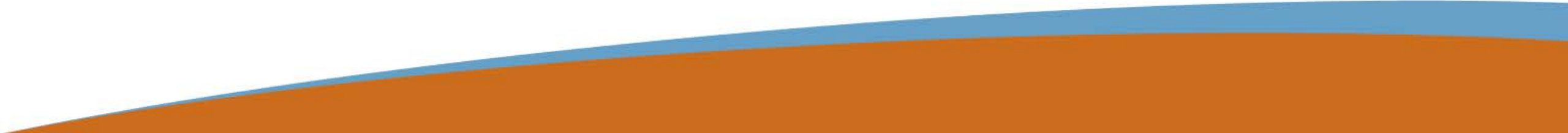
Leadership and Cultural Foundations to Empowerment

- Rewarding leadership traits and behaviors
 - Empower employees to have a voice
 - Personal and professional individual growth plans (IDPs)
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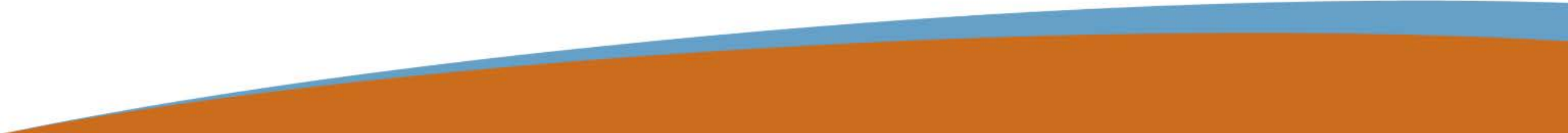
Reward Leadership Traits and Behaviors

- An organization's culture is built on leadership and expectations.
 - Empowered employees are confident, knowledgeable, and happy. That attracts members and growth.
 - Leaders can make or break people. Look for and reward those who inspire and encourage.
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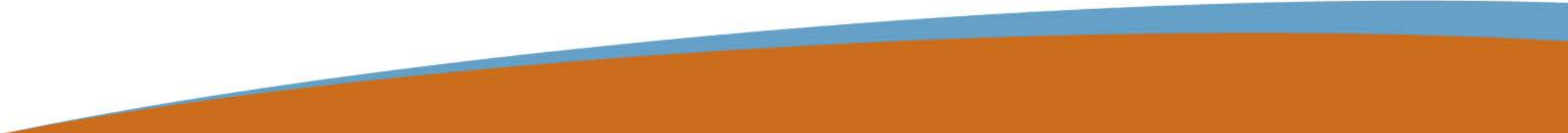
What traits and behaviors are important?

- Identify and model the desired traits and behaviors. Ask what the best leaders do!
 - Some examples: humility, positive energy, calm, open-minded, great communicator.
 - Interview and hire for the identified traits, entry level to the top.
 - Promote with those traits and growth potential top of mind.
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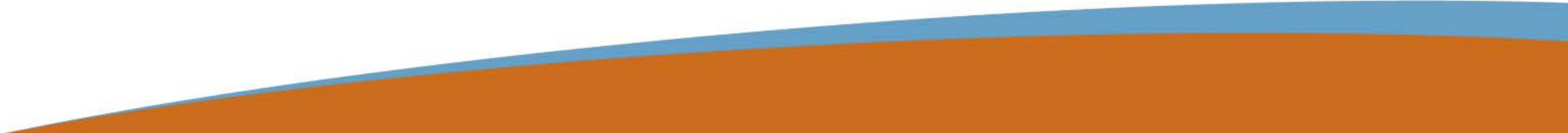
Empower employees to have a voice

- Employees who feel a sense of safety and trust (and fun) will share feedback, good and bad.
 - Coach employees on feedback and difficult conversations. Model the desired behavior.
 - Have an organizational mechanism for regular feedback (at MSCU, cultural steering committee and constituent groups).
 - Instead of shooting the messenger, thank the messenger.
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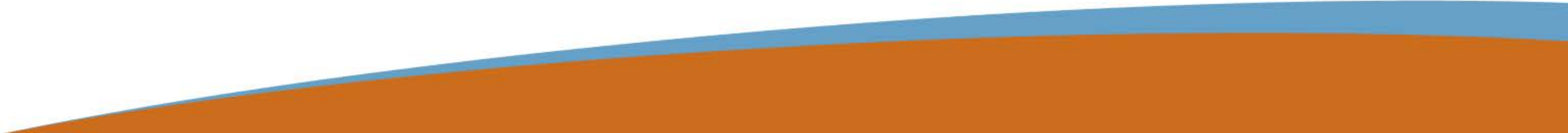
Empower employees to take ownership

- Set an expectation for leadership and ownership at all levels.
 - Build safety and trust through strong supervisor and mentor relationships.
 - Show employees how their work makes a difference in organizational success.
 - Ask every employee about their career interests and ambitions. Be curious about people and their potential.
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Individual Growth Plans (IDPs)

- Encourage Individual Growth Plans, with meetings to discuss content at least annually with direct supervisor.
 - IDPs can be a planning and budgeting tool, as well as help with succession planning.
 - Development and training can be targeted to desired outcomes.
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Individual Growth Plans (IDPs)

- Employees feel a sense of ownership and belonging if their ambitions are known and encouraged.
 - Building a growth plan can also help identify personal ambitions and values.
 - Talents and skills can be uncovered, as can skills and behavior gaps.
 - Employees appreciate feeling seen and heard.
 - As employees grow, your organization will grow.
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Chuck Purvis, President/CEO

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About Coastal

Assets	\$2.9 billion
Members	243,000
Branches	22
Employees	509
C-Level Executives	7, including CEO
AVP/VP Positions	30
Market Area	Raleigh, Durham, Chapel Hill, RTP 16 contiguous counties
SEG's/Associations	Over 1,700

About Chuck

- Started with NC Credit Union League in 1981 – in credit union movement ever since – US Central and then Coastal
- Joined Coastal 16 years ago – CEO for last 5-1/2 years
- We're doing something right at Coastal
 - Best Places to Work in Triangle 3 of last 4 years
 - Top 50 Employers in NC in 2017
 - TBJ Businessperson of Year for 2016
 - TBJ CEO of the Year for 2017 (one of 20)
 - CUES Outstanding Chief Executive in 2017
 - Herb Wegner Individual Achievement Award winner in 2018

Our Vision Map



Requisite Organization – A Total Systems Approach for Integrated Talent Management, Organization Design and Managerial Leadership

Requisite Organization is a scientific, total-systems model for organization design, talent management, and managerial leadership backed by decades of research led by the late Dr. Elliott Jaques. The model provides a theoretical base and common language for measuring work complexity and human capability that allows for sane-making, systems-level design solutions for organizational effectiveness.

Use of the model allows organizations to systematically:

- Match employees to roles that allow for the fullest expression of their gifts.
- Match employees to managers who can provide them satiating leadership.
- Structure the organization to catalyze free flow of communication and leadership both vertically and horizontally.
- Clarify accountabilities and authorities to enable productive work.
- Codify effective managerial leadership practices.

Coastal Credit Union Adoption of Requisite Organization Principles

- 5- Level Organization
- Stratum 5 – CEO
- Stratum 4 – 6 C-level Executives
- Stratum 3 – 30 AVP’s/VP’s
- Stratum 2 – Managers/Professionals
- Stratum 1 – Front Line/Operations

Complexity Level	Stratum	Complexity Level	Complexity Level
Most Complex	8	Construct and pursue world wide strategic plans in the largest of the world’s corporations.	Super Corporation CEO
	7	Construct and pursue world wide strategic plans. Place businesses in the world.	Corporate CEO
	6	Lead the accumulated impact of multiple business units.	Corporate EVP
	5	Optimize the function of a single business unit or corporate support staff.	Vice President Business Unit President
	4	Manage multiple, interdependent serial projects. Balance resources among a number of departments.	Director General Manager
	3	Plan and carry out sequential projects while considering contingencies and alternatives.	Regional Manager Unit Manager Manager of Managers
	2	Accumulate bits of information to diagnose and anticipate problems. Proactivity appears. Trends are noticed.	District Manager First Line Manager Supervisor
Least complex	1	Follow predefined procedures. When an obstacle is encountered, seek help. No anticipation of problems is expected.	Shop Floor Operator Clerk Cashier Teller

Leadership Development for C-Level Executives

- 5 of 6 executives are in their 40's (I'm 60)
- Board/Committee Appointments
 - Chair all Committees and CUSO Boards
 - Serve on 1 credit union movement Board or Major Committee
 - Serve on 1 local non-profit Board
- Executive Development Programs
 - CUES CEO Institute
 - CUES Strategic Innovation Institute
 - Cardwell 306-2 Program
 - CUDE Program

Leadership Development for C-Level Executives

- Networking/Learning Programs
 - CUNA Councils
 - CUNA, League and NAFCU Conferences
 - Banking Conferences
 - Technology Conferences
- Internal Development Programs
 - Job Rotation every 3-5 years – take another C-Level position
 - Weekly senior management meetings
 - Strategic planning sessions throughout the year
 - Leadership of company-wide projects
 - Executive Coaching Program

Leadership Development for VP/AVP Roles

- Decathlon Program (12 in 1st class – year long development)
- Tuition reimbursement program for advanced degrees
- CUDE Program
- CUNA Schools and Vendor Conferences
- Job Rotation opportunities – to other VP/AVP roles
- Major project leadership
- Membership on Coastal committees and CUSO Boards
- Participation in annual management planning session
- Periodic Board planning session participation
- Weekly leadership huddles

Unique Programs at Coastal

- Adoption of Requisite Organization Model
 - 3rd party interviews of every Stratum 3, 4 or 5 candidate – can they handle the complexity of the role?
- Significant financial commitment to management and leadership development – fully supported by our Board
- Manager Once Removed (MOR) meetings focused on employee development

Final Thoughts

- It ain't about me, its all about us, and its all about doing the best job possible for our members, today and tomorrow
- It's amazing what an organization can accomplish when the entire leadership team collaborates toward common goals
 - 11% Net Worth
 - 99 bp ROA
 - \$25 million giveback to members in 2017
 - \$2.5 million Loyalty Bonus in 2018
 - 100% Loan to Share Ratio
- My legacy is the quality and capabilities of the team I leave behind
- If I'm successful, all of my C-Level executives will be prepared to run a multi-billion \$ credit union