

CUNA HR & Organizational Development Excellence Awards



2015 Winners

The CUNA HR & Organizational Development Council's Award Program recognizes and honors credit unions that exemplify excellence in the human resources and training disciplines and serves to promote credit union philosophies through people leadership.

The distinction is reserved exclusively for the credit union HR & Organizational Development elite. Those who in all aspects of their chosen profession, consistently excel for the benefit of their credit union, uphold the standards of the HR & Organizational Development professional ethics and contribute to the credit union movement.

The Excellence Award winners from the CUNA HR & Organizational Development Council were announced during the council's 21st annual conference held April 22-25, 2015 in Hollywood.

The 2015 winners are (by category):

- **Pioneer West Virginia Federal Credit Union, Charleston, WV**
Winner Employee Engagement (Assets Less than \$499M) for *Ask Employees and You Shall Learn a Lot*. After a decade under prior leadership, the staff lacked confidence in their abilities to achieve much of anything and it was showing in every imaginable performance metric. The new management team reviewed the whole organizational culture they had inherited and understood they need to get employees engaged. Using a survey the management team solicited thoughts and feedback from employees. In addition to the survey, they assembled a focus group and held a half day discussion on results. As a result of the survey and the focus group, management was able to respond to employee concerns with decisive action, not just words. Getting employees comfortable and routinely involved in providing their thoughts and incorporating those thoughts into decision making is invaluable in engagement. [View the entry.](#)



- **Purdue Federal Credit Union, West Lafayette, IN**
Winner Employee Engagement (Assets \$500M - \$1B) for *Growth, Opportunity, Development and Leadership Program (GOLD)*. Purdue began the development of the GOLD Program (Growth Opportunity Leadership Development) when surveys revealed a lack of training and opportunity for tellers and Member Service Specialists. The eight program modules allow employees to learn and develop in their current role, and prepare them for the role of a Member Consultant. These modules include classroom training and a hands-on approach to learning. The employees learn everything from basic transactions to home equity loans; practice their new skills in a secure learning environments; and are then provided on-going coaching by their branch manager. Currently 86% branch employees are participating in the program and eight employees have been promoted to the Member Consultant role. They were able to reduce their FTE from 14 to seven in the first branch that adopted the model. Since the introduction of the GOLD program, teller turnover decreased to 14.38%. [View the entry.](#)
- **Pen Air Federal Credit Union, Pensacola, FL**
Winner Employee Engagement (Assets More than \$1B) or *Embracing Culture Program*. With Mission and Vision Statements in place, the goal was for all employees to understand the company's new culture and be prepared to make a commitment to it by the year's end. Pen Air's 4 key values were identified and they began to develop staff training centered on developing their culture. A multi-step multimedia approach was envisioned. At the all-staff training, the team shared videos communicating a shared sense of purpose from the Executive Team throughout the branches and departments. The leadership team also created presentations on the values. All this was followed up by a series of workshops to engage existing employees in their new culture. Through exercises in communications and team-building, employees have worked with the culture concepts, and have shared their experiences with each other. Pen Air is proud of their culture and it shows with a record high engagement score of 85.92 in 2014. [View the entry.](#)
- **Heritage Trust Federal Credit Union, Summerville, SC**
Winner HR/ORG DEV Management Practices (Assets Less than \$499M) for *Building-Blocks Training Approach*. The policies and procedures had become overwhelming and unreasonable for employees to absorb through past training methods. The Training Department developed a Building-Blocks Training Approach that moves beyond processes and procedures and is geared towards leveraging the organization to develop effective training programs. This training approach makes the experience more effective by presenting the learning responsibilities and duties in digestible chunks, establishing a support system of highly trained mentors and coaches, creating unison and accountability, and effectively measuring the end result.



Instructor led training consists of 12 days, but the classroom training correlates with on-the-job mentoring and coaching to help the learner better retain knowledge and skills. As a result of this training strategy employees are more engaged and have improved their productivity and performance. [View the entry.](#)

- **Rivermark Community Credit Union, Beaverton, OR**
Winner HR/ORG DEV Management Practices (Assets \$500M - \$1B) for *Mission: Create the Cutting Edge Branch of the Future*. The goal was to transform their Gresham, Oregon location into a cutting edge branch of the future. Requiring involvement from every team across the organization, the Member Resource Center project was unlike any branch opening the credit union had ever undertaken. The Training Team was deeply involved in the project and played a vital role from the very beginning. They learned and tested the technology then created workflows and procedures. They developed and tested the innovative new branch processes and also launched key organization-wide initiatives, such as a member appointment system. HR also played a major role in the project. Staffing for the new branch model delineated traditional roles of teller, new accounts and lending. The teller transaction function would now be centralized at the administrative offices through a Personal Teller Kiosk. The branch employee would be expected to perform all functions, requiring advanced skill levels in service, sales, product knowledge, new accounts, lending, banking technology and Member Resource Center processes. The additional professional development and training have contributed to a zero turnover rate in the branch since launch and provides additional career development and promotional opportunities for the entire organization. [View the entry.](#)
- **Mountain America Credit Union, West Jordan, UT**
Winner HR/ORG DEV Management Practices (Assets More than \$1B) for *Webinar Training Companion: A Blended Approach*. As their branch network has increased, the team recognized a need to incorporate more online, virtual and webinar training. With more self-directed learning in their curriculum, it was important they develop not only operational skills but also employee accountability. In March 2014, they launched a new check processing system. They installed new software and hardware in all of their branches. Job at hand – determine the best approach to train approximately 700 branch employees in a three-month time frame. They decided to facilitate the training via webinar. Utilizing their eLearning software, they created an online pre-work course. The employees were required to complete the pre-work training prior to a live, one-hour webinar with a trainer. In addition, they created a quick reference and a troubleshooting document that walked the trainee through the steps of scanning a check and identifying mistakes and correcting errors – all focused on developing the branch staff’s operational skills. Additionally, they created an online simulation course that allowed the employees to have 45 minutes of hands on practice and track who had completed the course



and who did not. Using this blended approach Mountain America has seen great success and fewer errors. [View the entry.](#)

- **Town & Country Federal Credit Union, South Portland, ME**
Winner HR/ORG DEV Strategic Leadership (Assets Less than \$499M) for *Internal Internship Program*. Continuing to grow and wanting to promote from within the team, Town & Country knew they need to get more nimble and quicker with moving employees into newly created roles. Job shadowing was implemented but just wasn't enough so their very first internal internship program was created. Similar to a college internship program, employees would begin interning in existing departments. Employees selected, split time between their current job and their internship. Ranging from 1-6 months, the internships were chosen for things that had relatively easy tasks that could be learned quickly and had flexible time constraints. This program has been very successful in this credit union and in some cases has cut six months out of the recruiting and training process. Additionally, employees have the opportunity to explore and learn about other departments while helping their peers. It has been a win-win. [View the entry.](#)
- **University of Michigan Credit Union, Ann Arbor, MI**
Winner HR/ ORG DEV Strategic Leadership (Assets \$500M - \$1B): for *UMCU Talent Review*. In an effort to create an environment where talent is a priority for continued growth and success, the team at University of Michigan CU conducted a 2-day talent review. The process defined a common language for talent, identified high and low performers, identified key performance gaps and the impact on those gaps and assessed the readiness of the current leaders. The talent review has allowed the leadership team to visualize where they are headed and how the focus of their talent discussions and work align with the success of their strategic plan. It has given them the outline of the necessary steps to develop each team member to ensure they are utilizing their individual strengths to accomplish their career objectives and the objectives of the credit union. [View the entry.](#)
- **Mountain America Credit Union, West Jordan, UT**
Winner HR/ ORG DEV Strategic Leadership (Assets More than \$1B): for *Professional Foundations: A Learning Strategy*. With a huge growth spurt, the Educational Services team at Mountain America had tried to maintain consistent, high quality training. They worked to adjust and adapt their training on the fly but, like a city growing without a plan, they were experiencing the learning and development version of "urban sprawl"...a strip mall here, a single family dwelling there and an apartment building further down the road. It was time to step back and create a plan. The team determined what categories of a training are most important. If the content didn't fit into a category, it was out. Through their work, they



developed their professional foundations training categories, which are: Purpose & Culture, Service Philosophy, Success Guidelines, Core Responsibilities and Internal Support. The 5 foundational categories can be applied to any operational class, both instructor-led and e-learning. The development and ongoing implementation of their department strategic plan has allowed them to focus daily on the things most important to fulfilling the needs of their stakeholders and through them, their membership. [View the entry.](#)