



EMPLOYEE ENGAGEMENT: VALUE INTEGRATION & CHANGE MANAGEMENT

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The leadership team at Universal 1(U1) Credit Union made the decision to integrate U1 values throughout the entire employee life cycle. These changes were effectively managed through organizational partnerships and transparent communication. Our U1 values are more than a tagline on our website or a poster on the wall. It is our U1 way of life. Now we have tools in place and updated processes to support our values making a positive impact on our culture.

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UNIVERSAL 1 CREDIT UNION – DAYTON OHIO

VALUE INTEGRATION & CHANGE MANAGEMENT

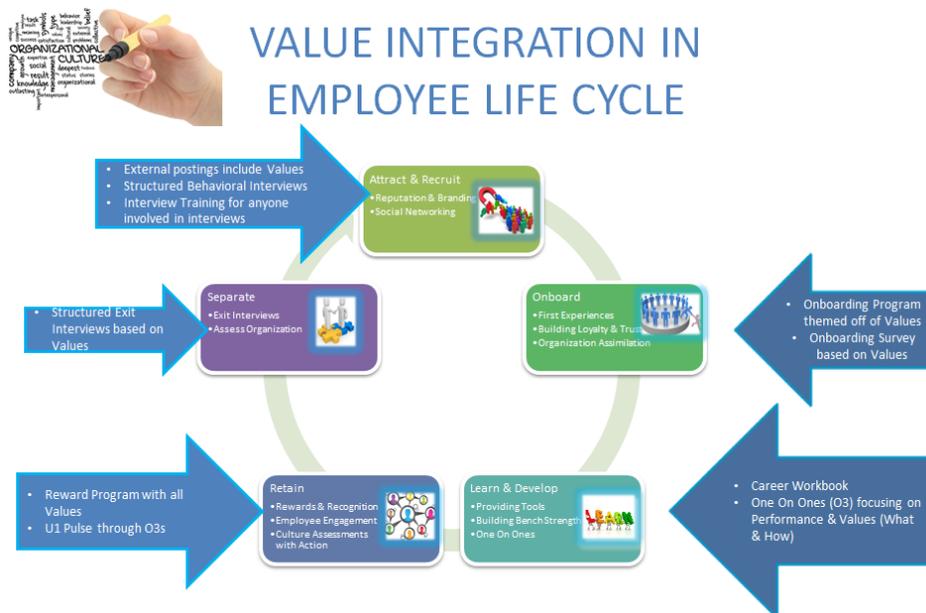
Establishing the Need

During the summer of 2015, our team of Universal 1(U1) Officers reviewed an article about culture. The Officers agreed I would be partnered with another Officer to lead a culture conversation in September 2015. Kathryn Lewis, AVP Accounting Services, and I spent time researching culture and ways U1 could make changes to support our culture and values. U1’s values have been in place for some time and speak clearly to the vision of the company. Our U1 values are **Friendly, Trustworthy, and Reliable** while providing **“Beyond What You Expected”** service to our members, businesses, community and each other.

An interactive presentation was created on culture with a proposed road map on ways to further enhance the U1 culture by integrating our U1 values throughout the employee life cycle. Materials were provided to help illustrate potential new tools and how this would support the value integration. The Officers were receptive and offered constructive suggestions on the presented materials.

Creating the Vision

Based on the Officer feedback, final adjustments were made to the value integration vision and project plan. The Officers were supportive of the framework and approved the final project plan. The framework below shows the approved changes to support integrating values throughout the employee life cycle.



Key Changes include:

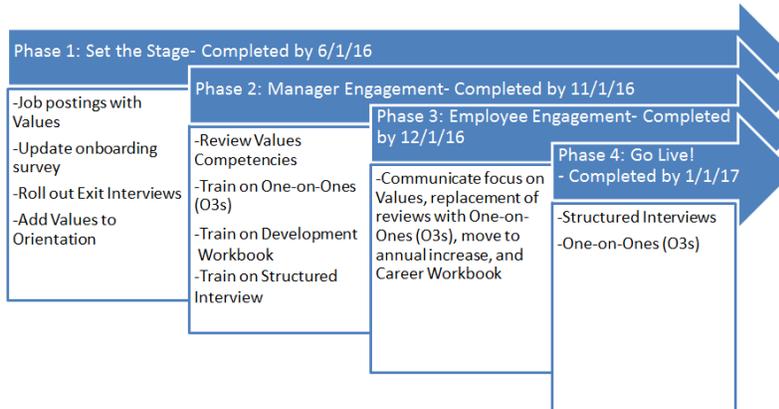
- Created Structured Behavioral Interviews packets & provided Hiring Manager training
- Competency descriptions for U1 Values created
- U1 Values added to onboarding process and survey
- Created Career Workbook
- Implemented One-on-Ones (O3s) replacing performance reviews
- Started Exit Interviews with focus on values

The decision to move away from traditional performance reviews was based on feedback from employees and managers. The performance review process was lengthy, time-consuming, and not a positive experience for all parties involved.

Benchmarking was conducted to find a way to manage performance without traditional performance reviews. Our studies showed companies such as GE, Microsoft, Adobe, Accenture, Gap, Deloitte, IBM, Deseret First FCU, and USF Federal Credit Union who moved from performance reviews to frequent check ins. This information provided us with the necessary information to make the decision to move to a two-way communication process where the time is spent with employee insight, manager feedback on how the job is being performed and how the employee is demonstrating U1 values, and a joint conversation on the future.

Driving Commitment

The leadership team showed commitment by providing the necessary resources to have a successful roll out. A phased project plan was established to create buy-in, excitement, and allow ample time for training and implementation. Below is the high level project plan which illustrates the agreed upon approach.



Change Management

The Value Integration was implemented in the four stages listed above. The leadership team was transparent in the communications to managers and employees. Our U1 Team understood we were making changes to better align with our U1 values of **Friendly, Trustworthy, and Reliable**. Managers were appreciative of the opportunity to go through training on the new processes and become change agents. There was an overall positive reception to the change among all U1 employees.

Sustaining the Change

Feedback from employees and managers has been positive. Using a phased approach helped to allow enough time for changes but also provided the reason why changes were taking place. The “What’s In It For Me?” question was answered at all levels of the organization. Having ownership at our highest level of leadership in the organization is what created the best end product and allowed us to become true ambassadors of U1’s values. The phased approach also allowed our team to prepare and adjust for the changes in small increments.

BUSINESS IMPACT

The Value Integration continues to prove its positive impact for Universal 1, as supported by these examples.

Interviews

A Hiring Manager contacted HR to let us know that she used the new interviewing process. After practical application, she better understands how it can help us have better hiring conversations. She continued to share that she would have hired this candidate before. Now, with our structured process with behavioral-based interview questions tied to our values, she was able to obtain the necessary information to recognize the candidate was not the best fit for our culture. Other managers have shared similar stories and are looking for employees who can work within U1’s values.

Employee Feedback

In December 2016, a third party surveyed U1 employees regarding our commitment to employee engagement. 75% of our employee population responded to the survey. When our employees were asked what word best describes U1’s work environment they stated “**Friendly**”, which is one of our U1 values.

Turnover & Exit Interviews

U1’s turnover decreased by 31% from 2015 to 2016. Exit interviews have also helped us to evaluate and monitor our progress in regards to employee retention. Adding value training to new employee onboarding has allowed new employees to embrace our values earlier on in their assimilation process. There are various factors improving our retention but we believe our employees stay because U1 is **Friendly, Trustworthy, and Reliable**.

SUMMARY

U1’s value integration throughout the employee life cycle continues to support the organization in living the U1 values. This project which started in the summer of 2015 has been a collaboration of business partners who understood the need for a sustainable process, believed in a vision, committed to implementation, established necessary changes and monitored the potential impact to U1. When these discussions started, U1 did not foresee or plan to be ready to move away from performance reviews, move from anniversary increases to annual increases, or reintroduce exit interviews. These advancements were possible due to the team of leaders who embraced being uncomfortable and asking provocative questions. If Human Resources would have rolled out this type of initiative in the summer of 2015 without any of these key discussions or an engaged leadership team, we would have ended up with minimal changes and buy-in. This value integration was successful based on the cross-functional leadership team’s important role of change agents in the organization. In summary, U1’s value integration was a success made possible with effective change management.