

SOLUTIONS



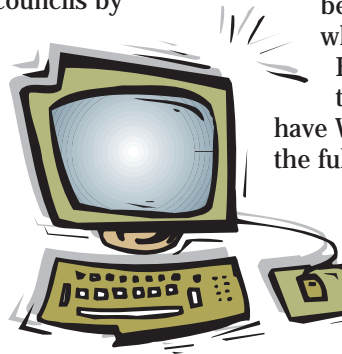
AN ELECTRONIC REPORT FROM THE CUNA OPERATIONS OFFICER COUNCIL

Newsletters Go On-line

If you're reading this from a sheet a paper, you're already behind the curve.

Starting in January, 1999, the CUNA Council newsletters will go electronic! The first issue for 1999 can be found by going to www.cuna.org, click on COUNCILS, then select the CUNA Operations Council. The second and subsequent issues will be found within the secured site of the COO Council's Web page and accessible only to COO members with a password (directions will be found there).

According to the results uncovered in a recent survey conducted for the councils by Syndics Research, as well as through a lot of conversation with council members, you prefer receiving council news electronically. It's the COO Council's goal in 1999 to provide all newsletters and white papers on the "members only" section on the Web and phase out paper-based distribution as members permit.



Thanks to the Web's virtually limitless possibilities, you'll receive your council news in color for the first time. Thanks to the availability of digital photography, we'll also be able to feature photos and illustrations to make your newsletter livelier and more appealing. And you'll receive more news than ever before, too.

We realize that not all members have regular Web access. We will continue to fax newsletters to all council members during the first two quarters of 1999 the same way we always have done. The information will be just as good, but the graphics will have to be paired back to accommodate the fax's black-and-

white medium. By September, we'll begin to fax only to those members who still need or want paper copies. By the time we enter the new century, we hope all members will have Web access and are able to enjoy the full impact of the newsletters.

Electronic information distribution - members asked for it, the CUNA COO Council is delivering! Just another benefit of membership! ♦

Our 1999 Member-Get-a-Member Campaign

The CUNA COO Council is devoted to becoming the key critical professional resource for credit union operations professionals. Help your organization achieve this goal by signing up a brand new member in the CUNA COO Council. You'll receive public recognition for your efforts and a coupon good for an additional \$50 off your registration fee for the 1999 CUNA COO Council Operational Dynamics Conference October 10-13 at Loew's Annapolis Hotel in Annapolis, Md.

Make sure your new recruit writes your name in the "I was referred by..." line on the

membership application. All new members must be recruited and enrolled prior to June 30 mid-year deadline to qualify. All members must be new members in order to qualify for the credit. Sorry, renewals don't count.

Renewal Time....

It's time to renew your membership to the CUNA COO Council if you haven't already done so. Not only do you receive research papers that explore specific issues in depth (with one coming up this month!), you also receive discounts on CUNA National Schools, a bi-monthly newsletter with pertinent topics for operations professionals, networking via the on-line CUNA Councils listserv, and CU professionals committed to your personal development (see the article on the hottest

new professional development tool around, Career ExCELL in this issue), plus more.

Also, elections for officers of the CUNA COO Council are coming up in June, and you must be a member in good standing in order

to be nominated. Renew today and keep in touch with the first national organization run by credit union operations professionals for credit union operations professionals. ♦

CUNA COO Council? Committed to You!

Your CUNA COO Council Executive Committee met earlier this month in Annapolis, MD, site of the CUNA COO Council conference in October, 1999. At the conference, we'll be introducing the new Career ExCELL program, a professional development tool designed to identify the skills needed to be a successful COO in today's challenging times. And with the new CEO discipline in the works, operations professionals aspiring to higher levels will be able to identify the critical skills needed to move their career ahead more quickly.

Your Executive Committee identified the traits most critical to the COO position for 1999, and the skills needed 5 years from today. COOs can use the new career-building tool to identify pertinent skills and develop personal and professional goals designed to make them a stronger COO, to become a COO, or to elevate to a CEO.

We've got a lot in store for you in 1999! And now that your Executive Committee has a year under our belts, you'll be surprised and pleased with the actions the Committee and CUNA is taking on your behalf! 1999 is a year you won't want to miss with the CUNA COO Council! ♦

What Does it Take to be a Good COO?

The CUNA COO Council is participating in a project to bring you the necessary technical competencies and leadership criteria it takes to qualify as the consummate COO. Produced in conjunction with the Cardwell Group, a Cleveland-based consulting firm, Career ExCELL is a joint project by all six CUNA Councils to increase the value and professionalism of the positions they serve. The following essential leadership traits were identified from a listing of 67 different leadership skills listed in the Career Architect series, produced by Lominger Limited. Designed to be used in conjunction with Career ExCELL, the Lominger cards list critical leadership traits, as well as characteristics when these traits are overused or underused. For credit union COOs, these skills are:

1. **Customer focus**—Is dedicated to meeting the expectations and requirements of internal and external customers; gets first hand customer information and uses it for improvements in products and services; acts with customers in mind; establishes and maintains effective relationships with customers and gains their trust and respect.
2. **Developing direct reports**—Provides challenging and stretching tasks and assignments; holds frequent development discussions; is aware of each direct report's career goals; constructs compelling development plans and executes them; pushes direct reports to accept developmental moves; will take direct reports who need work; is a people builder.
3. **Ethics and Values**—Adheres to an appropriate (for the setting) and effective set of core values and beliefs during both good and bad times; acts in line with those values; rewards the right values and



CAREER ExCELLSM

- disapproves of others; practices what he/she preaches.
4. **Interpersonal savvy**—Relates well to all kinds of people, up, down, and sideways, inside and outside the organization; builds appropriate rapport; builds constructive and effective relationships; uses diplomacy and tact; can diffuse even high-tension situations comfortably.
 5. **Problem-solving**—Uses rigorous logic and methods to solve difficult problems with effective solutions; probes all fruitful sources for answers; can see beyond hidden problems; is excellent at honest analysis; looks beyond the obvious and doesn't stop at first answers.
 6. **Driving for results** - Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; very bottom-line oriented; steadfastly pushes self and others for results.
 7. **Self-development**—Is personally committed to and actively works to continuously improve him/herself; understands that different situations and levels may call for different skills and approaches; works to deploy strengths; works on compensating for weaknesses and limits.
 8. **Building effective teams**—Blends people into teams when needed; creates strong morale and spirit in his/her team; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; defines success in terms of the whole team; creates a feeling of belonging to a team.
 9. **TQM/Re-engineering**—Is dedicated to providing the highest quality products and services which meet the needs and requirements of internal and external customers; is committed to continuous improvement through empowerment and management by data; is willing to re-engineer processes from scratch; is open to suggestions and experimentation; creates a learning environment leading to the most efficient and effective work processes.
 10. **Managing vision and purpose**—Communicates a compelling and inspired vision or sense of core purpose; talks beyond today; talks about possibilities; is optimistic; creates mileposts and symbols to rally support behind the vision; makes the vision shareable by everyone; can inspire and motivate entire units of organizations.
 11. **Work/Life balance**—Maintains a conscious balance between work and personal life so that one doesn't dominate the other; is not one-dimensional; knows how to attend to both; gets what he/she wants from both.
- In addition, personal development is critical for career advancement. Organizations such as the COO Council help by keeping members apprized of critical issues, by providing networking opportunities, and providing ideas on solving COO issues. The COO Council is committed to personal and professional development of its members. With top-notch conferences and speakers (see tentative agenda in this issue), white papers, newsletters, and career-development tools like Career ExCELL, operations professionals can achieve greater success for their credit unions.
- Career ExCELL will be ready to order in April 1999. Watch for further details coming your way soon. ♦

Coming soon...

Have you ever thought about volunteering your time to helping fellow operations professionals? Why not run for the CUNA COO Council Executive Committee? The call for nominations will be sent out in the near future and we'll need a few good volunteers who are committed to their personal and professional growth, as well as to the development of other operations professionals. If you think you'd like to get involved, renew your membership today and watch for nomination information. ♦

'99 Conference Planned: Mark Your Calendar

One of the most important issues to come out of the strategic planning meeting in Annapolis was the development of the agenda for the 1999 CUNA COO Council Operational Dynamics Conference. The event will be held October 10-13 at Loew's Annapolis Hotel in historic Annapolis, Md.

Committee members roughed together an agenda that focused on three separate tracks deemed critical to the development of COOs: human resources, technology and finances. Here's a look at the topic agenda for this year's Operational Dynamics Conference:

SUNDAY, October 10

Noon - 6 p.m.	Registration
1:00 - 5:00 p.m.	Preconference Workshop: Branching Out (Separate fee required.) Understanding branch placement, facilities development, the economic component and measuring branch performance.
6:00 - 7:00 p.m.	Welcome to Annapolis Reception

MONDAY, October 11

7:00 - 8:00	Continental Breakfast
8:00 - 9:15	Opening General Session: Cultivating Your Leadership Quotient
9:15 - 9:30	Networking Break
9:30 - 10:45	Concurrent Breakout Sessions 1) HR TRACK Distributive Workforce Development (telecommuting, flex hours, etc.) 2) TECHNOLOGY TRACK Tiering Technology: How your CU Sizes Up 3) FINANCE TRACK Measuring Economic Trends
10:45 - 11:00	Networking Break
11:00 - 12:15 p.m.	Concurrent Breakouts Repeat
12:15 - 1:30	COO Council Membership Luncheon (All Attendees Invited)
1:30 - 2:45	Concurrent Roundtable Discussions 1) Best Operations Practices 2) Call Centers 3) Celebrating Professional Successes
2:45 - 3:00	Networking Break
3:00 - 4:15	General Session: Your Professional Development An introduction of Career ExCELL

TUESDAY, October 11

7:00 - 8:00	Continental Breakfast
8:00 - 9:15	General Session: TOPIC TBA
9:15 - 9:30	Networking Break
9:30 - 10:45	Concurrent Breakout Sessions 1) HR TRACK Compensating the New Work Force 2) TECHNOLOGY TRACK Maintaining Member Focus in a Technological World 3) FINANCE TRACK ALM: Pricing Your Balance Sheet
10:45 - 11:00	Networking Break
11:00 - 12:15 p.m.	Concurrent Breakouts Repeat
12:15 - 1:30	Networking Luncheon
1:30 - 2:45	Concurrent Roundtable Discussions (Topics Repeat from Monday) 1) Best Operations Practices 2) Call Centers 3) Celebrating Professional Successes
2:45 - 3:00	Networking Break
3:00 - 4:15	General Session: Ethics and Values-based Leadership

WEDNESDAY, October 13

7:30 - 8:30	Continental Breakfast
8:30 - 9:15	HR MINI WORKSHOP Part 1 Management Mentoring TECHNOLOGY MINI WORKSHOP Part 1 Delivery Systems 2000: Electronic Branching FINANCE MINI WORKSHOP Part 1 Capturing the Member Business Loan Market
9:15 - 9:30	Networking Break
9:30 - 10:45	HR MINI WORKSHOP Part 2 Management Mentoring TECHNOLOGY MINI WORKSHOP Part 2 Delivery Systems 2000: Electronic Branching FINANCE MINI WORKSHOP Part 2 Capturing the Member Business Loan Market
10:45 - 11:00	Networking Break
11:00 - 12:15	Closing General Session: Balancing Work and Life: A Humorous Approach



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