

FORUM Credit Union

Giving Employees a Voice and Path

By Rebecca Patrick

“You can go talk to anyone here; everyone is approachable. There are no walls. When we hire new people, that’s one of the immediate feedbacks we get,” offers Andrew Spirrison, assistant vice president of retail delivery.

That culture is directly attributable to the transparent, collaborative management style that puts everyone on the same page with company objectives – all of which link back to serving the credit union members, says chief operating officer Jenny Budreau, a 28-year FORUM Credit Union veteran.

This atmosphere also translates to letting employees – nearly 300 of them – have their say and the company responding.

“It’s all about having that discussion. They want your input; they ask for and encourage it. We push member service first every day and that empowerment of doing what we can to help members is what makes it so much fun to come to work here,” believes Trevor Greene, a technology support agent in the call center.

Naturally, that doesn’t mean there isn’t the occasional bump in the road. A few years ago when FORUM rolled out its Saturday hours, there was some turnover in the branches. But management reacted swiftly. The organization implemented a bonus program for those who worked a certain number of Saturdays in the quarter. “Now we have employees who want to work every single Saturday, because if they do that throughout the whole year that’s an extra \$2,000,” Budreau notes.

She says the comparison of what the bonuses cost the organization versus the turnover that it was experiencing has been very positive, adding: “It makes our employees feel like we listened to them and we did.”

What’s more, FORUM supervisors freely share praise, observes indirect lending specialist John Pitney. “We do shout-outs on the Socialcast (company’s own Facebook-like blog), so if anyone does anything great you hear about it right away. It just makes you feel good and like you are rewarded for what you do.”

For some, like Julie Clark, assistant vice president of accounting, the FORUM way is almost a culture shock, albeit a most welcome one. “I was working in a very high-stress, non-people, get-the-job-done and here’s-more-to-do environment. So I couldn’t have made more of a complete 180 if I had tried. Here, it’s all about get your job done, go home, don’t worry about it, do you need help and what kind of resources do you need.”

Budreau says the last decade or so at FORUM has brought about an even more staff-focused commitment – “in leadership development, soft skill development, technology skill development; the whole shooting match. And it’s important to employees to know that the company is going to invest in them.”

That sentiment culminates each President’s Day with FORUM’s Day of Celebration, a full-day, all-employee training session that also features food and awards.

In terms of specific career paths, there are a number of options for employees at various levels. A relatively new effort is FORUM Future Leaders, which is in its fourth year. “It’s an opportunity for them to practice and role-play the skills they are learning. They do presentations in front of the entire officer group. They have an opportunity to interface with the board of directors. It’s just a program where they can really be engaged in a different way,” Budreau describes.

Participants in the one-year program are paired with a mentor in the organization. To be considered for a spot (this year there are 12), employees must apply and have a letter of recommendation from his or her supervisor.

Likewise, FORUM is a big proponent of letting employees explore movement within the company. “You don’t stay stagnant here. You can choose to stay in the same job, but you don’t have to. You can always find a way to branch out and move into something different to move



The FORUM staff votes on a charity to support for the entire year. In 2011, the Humane Society of Hamilton County was the beneficiary.

your career along,” Greene states.

Adds Spurrison, “I tell people in my department I don’t want you to ever think about it as just a job because we have several opportunities and avenues you can take. I’m a perfect example of that. I started out in retail. I’ve worked in commercial services and came back to retail because of the different opportunities that presented themselves.”

For 2012, another area FORUM is making a concerted effort to engage employees in is wellness – both physical and fiscal.

When leadership “realized employees weren’t saving as aggressively in their 401(k)” retirement plans as the company had hoped, the result, says Budreau, was an employee version of the “Save It Up” challenge for credit union members. This initiative encourages employees to “save money, reduce debt and get in better financial shape.”

On the health side of the equation, Anne Wiseman, vice president of human resources, reports the company is



A recent golf hole contest was a big hit. Says Pitney: “We had so much fun that we decided to leave ours up. Almost every day someone comes by to say, ‘Hi’ and hit a few balls.”

“working to (further) structure a program that everybody can participate in and earn wellness dollars for.” A drinking water campaign, full-service fitness center at the headquarters and \$200 annual gym allowance for branch employees are a few of FORUM’s wellness examples.

Jessica Rollins, ACH team leader, also appreciates “all the perks and deals” FORUM has negotiated for its employees. “They’ve partnered with certain apartment complexes where the first month’s rent is waived or there is a discount on rent. We can go to different restaurants and get anywhere from 5% to 25% off our bill – just for working here.”

Employees also receive a sizable discount off their AT&T or Verizon wireless phone bills.

Sums up Clark, “They told me when they hired me that they thought they oversold me on how great it is here, but about a month in I said, ‘Oh no, you didn’t!’ ”



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