

The Credit Union Connection MANAGEMENT

INSTRUCTION: This document may be reviewed in several ways:

1. Scroll through each page to review all of the entries in the document.
OR
2. Refer to the Table of Contents for an Alphabetical List by Credit Union Name below or the Table of Contents by Topic on the Next Page.

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Baptist Health South Florida Federal Credit Union

7315 SW 87 Avenue, Suite 300
Miami, FL 33173
Phone: (305) 412-9920
Website: www.bhsffcu.org
Charter: 14391
Assets: \$30 million
Year Chartered: 1961

The credit union performs quarterly reviews of staff evaluations to both enhance membership service and award employees. In addition, management sets quarterly goals, training, etc...

Beehive Federal Credit Union

1087 Erikson Drive
Rexburg, ID 83440
Phone: (208) 656-1000
Website: www.bhive.org
Charter: 13741
Assets: \$127 million
Year Chartered: 1960

The credit union developed a performance review of accomplishing the organizational goals for each employee. The results of the review are reflected in the employee's performance evaluation which creates consistency and accountability at all levels of organization.

Collegeville Community Credit Union

P.O. Box 5577
Collegeville, MN 56321
Phone: (320) 363-7751
Website: www.collegevillecu.com
Charter: 63325
Assets: \$10 million
Year Chartered: 1938

The credit union created a "scorecard" report for the Board of Directors to communicate actual performance against projections relative to key ratios.

Community South Credit Union

1044 Highway 90 East
Chipley, FL 32428
Phone: (850) 638-8376
Website: www.communitysouth.net
Charter: 67434

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Assets: \$57 million
Year Chartered: 1991

The credit union promotes the use of networking to access information regarding regulatory compliance. Community South discovered that other credit unions have years of experience in this area and valued the knowledge sharing.

Hawaii First Credit Union

P.O. Box 446
Kamuela, HI 96743
Phone: (808) 885-7349
Website: www.hawaiifirstfcu.com
Charter: 10938
Assets: \$38 million
Year Chartered: 1956

The credit union involves all staff, management, and volunteers in its strategic planning session. Such widespread participation is sought to demonstrate that the credit union values input from its entire staff and to communicate that they are critical to the success of the credit union. Additionally, the credit union has found that such participation helps staff to better embrace the strategic plan.

Logan Medical Federal Credit Union

500 E. 1400 N.
Logan, UT 84341
Phone: (435) 716-5093
Website: www.loganmedicalfcu.org
Charter: 14571
Assets: \$13 million
Year Chartered: 1961

The credit union has developed a computerized talent inventory and employee evaluation system. The manager is willing to share this system with other credit unions.

St. Thomas Employee Federal Credit Union

2115 Summit Ave #LOR209
St Paul, MN 55105
Phone: (651) 962-6660
Website: None
Charter: 5991
Assets: \$2.5 million
Year Chartered: 1949

The credit union uses retirees to serve on their supervisory committee. These retirees receive training as an independent tester.

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Tri Boro Federal Credit Union

600 E. 8th Avenue
Munhall, PA 15120
Phone: (412) 461-3018
Website: www.triboro-fcu.org
Charter: 794
Assets: \$108.7 million
Year Chartered: 1935

Early in 1935 a group of 25 men who were co-workers in the Homestead Plant of United States Steel formed what they called a "suit club". Each member of the group contributed \$1.00 from each pay, at which time a winner would be chosen and for his investment of one dollar he would be able to purchase a suit of his choice from a local men's store. One member of the group, Mr. John Piper, who was a time keeper had been reading about the newly formed credit union movement. He was so impressed with the idea that he started to discuss it with his 24 suit club buddies. After much discussion, it was decided that they would like to form a credit union for all of the employees of the Homestead Works Steel Mill. The charter was granted on November 30, 1935. In 1985 and 2006, the credit union expanded the charter to include communities since the mill was closing. The credit union can provide some insight in the expansion of the charter and serving a community.

Upper Cumberland Federal Credit Union

P.O. Box 529
Crossville, TN 38557
Phone: (931) 484-9433
Website: www.ucfcu.org
Charter: 832
Assets: \$23 million
Year Chartered: 1935

The credit union prepares for the annual NCUA examination and the Supervisory/CPA audit by maintaining two large notebooks with complete board packets including financials and a copy of the board minutes for the time period since the last exam or audit. The examiner or CPA does not have to use the credit union's original documents or make their own copy since each organization has been provided their own notebook to use as they please. This saves the examiner, auditor, and staff time during the examination or audit and it helps preserve the original documents. It is a win-win for everyone.