

Empathy is Strategy: Leading in a Way That Actually Connects

A Conversation with Steven Stapp, CUDE, President and CEO, Unitus Community CU

FULL TRANSCRIPT:

Heather McKissick

Hi. This is Heather McKissick. I'm CEO of CUES, and I'm really excited to be here today with Steven Stapp, who is representing Unitus Credit Union as the 2024 CUES Catalyst for Change Award winner. Thank you very much, not just for being here, but for everything that you have done to be a catalyst for change.

Steven Stapp

Well, thank you so much for having me and for Unitus Community Credit Union to receive this award is really a humbling experience, but it also shows all the work that throughout the entire organization, from the board to the management team to the staff, and dedicating what we do as a credit union, day in and day out for our community. So, this is quite the honor, and we're very thankful for this.

Heather

You said something interesting earlier, when you were talking about the DNA of your credit union and how this award being a catalyst for change is really just a natural extension of where you've been and where your members have been for a good long time.

Steven

So Unitus originally was a closed field of membership for Telecom employees, and so when I went to our very first event, it was a branch opening, I could see what our membership looked like, and it really reflected our community. And so as the credit union has been a community charter, we really felt like it was an important it was in our DNA, but it was an important time to focus on what were the needs of our community, and how could we reach even greater populations within our community, and I know that was what our board members at the time of that decision really wanted us to do. So, I really feel like we were putting into action what that original philosophy of the credit union was.

Heather

And that's what catalyst for change, right, means for you, that kind of strategy in action, and really what being as member centric as you are about everything you're doing, but also, by extension, really serving the community where your members live and work and play.

Steven

So that really allowed us an opportunity to look at our community, look at who we were, but

also to look at where is our community going over the next five and 10 years, and how can we reflect that in what we do as an organization and our procedures, our policies, how we hire from within the community, and then how do we outreach to that community? And those have been just wonderful moments as we have engaged with organizations within our community and worldwide that we hadn't previously engaged with.

Heather

We've talked a lot about collaboration, about the difference between cooperating and collaborating. You all are doing a lot of both. What's that secret sauce for you in terms of really casting that net wide and bringing in partners that are in service to everyone involved.

Steven

Yeah, you know, what we realized early on is we were very proud of the work that we did, but we couldn't do it all ourselves, and we could not do it alone. And so, it allowed us for several unique opportunities to engage in collaboration. One was working with other credit unions and the Urban League of Portland, and that was engaging with five different credit unions, each having their own unique talent experiences, to come together to work with an organization such as that for financial empowerment, financial education, and that has been just a great experience the others is working with our Hispanic community and being Juntos Avanzamos designated. It's a special designation for working with our Hispanic community. But as we saw that opportunity, the work that we were doing, we were able to host a round table and bring in 10-15 other credit unions from mostly from the Pacific Northwest and share best practices and ideas. And so, when we have that learning and exchange, we just all get better and much more engaged with our communities.

Heather

Talk about all boats rise, yeah. You know, cooperation among cooperatives, right? Well, you guys really are walking that talk, yeah. Tell me about your employees. How are they responding to that level of community leadership?

Steven

Yeah, you know, they've been part of the journey from the very beginning. And I want to say right away, we did an assessment internally to see how we were doing, and we saw that there was need for improvement. There were changes that we needed to solicit their ideas and their engagement along this journey. And so, I want to say that was so important, and then as equally as important as we were doing the work is reporting back to them what was happening, what were we doing, what ideas and suggestions did they offer us that we took in, and now we have accountability. Where we report back to them, and they have really been engaged with that, with that journey.

Heather

So, you are probably pulling up on all kinds of really unique leadership skills as the leader in that

situation. I know you have a great board that's very involved, and of course, is also helping you lead the way. But we've talked about collaboration and cooperation and being member centric and community minded. What's the leadership skill that you use the most, or that you really are intentional about when it comes to doing this work, yeah?

Steven

And that's a great question, and I will say, you know, the leader that I was 10 years ago is different now today, right? Yeah, I've had to evolve. I've had to events such as the CUES Symposium, learn from great leaders around the world and see what those skill sets are, and change and evolve. And so, if I boiled it down to one, it would be empathy, nice and empathy, and we now focus on empathetic leadership. And how do we make those connections with individuals, with our community, with those around the world? And when we have that understanding and that connectivity, it creates those partnerships for working with one another, and they're genuine partnerships with working with one another. And so, for me, that's if I could lead with that, and that is the one that is it. It wasn't really in our framework and working, if you asked me eight or 10 years ago. So, I want to say, you know, it's a learning, continual learning process.

Heather

Learning to learn, yeah, and learning to be even more empathetic than you probably naturally already are or have been over the course of your career. What does that look like on a day-to-day basis, if you were to tell someone, hey, I'm practicing empathetic leadership, yeah? What does that look like for you? And on a day at the office?

Steven

Yeah. Well, you know what I got to say? My mom just turned 90 years old, and I want to say that I get it from her, and she's a very engaging person, so she passed that attribute to me, but on a daily basis, I mean, it's, it's walking around the office, stopping, talking with people, finding out what they're doing, what they're working on, what's happening in their life. It's understanding and just looking at, you know, what are their concerns? And how can I help address those concerns, and at the same time they help me and help address concerns that I might have, or issues that I might have going on. You know, a couple years ago, my father passed away, and my board chair was very instrumental in reaching out to me on a continual basis. And he would say, well, who takes care of the CEO? The CEO is out there taking care of so many people, but who takes care of this person? So, he showed me empathy. So, when I when I look at that question, I look at great people and great examples in my life, and I look at, how can I amplify, exemplify what they are doing to be that better, empathetic leader.

Heather

I love that story. Yeah, I'm sorry about your dad. Thank you. The thing I was thinking about was this whole idea of, you know, engaging with the community in an empathetic way, and of course, you're engaging within your organization in an empathetic way, but, but the entire endeavor and all of the partnerships that you have created, that probably also took a lot of empathy. I mean,

that's a lot of listening, right? Yeah, pulling all those credit unions together, pulling all of these stakeholders together. So, I'm trying to put together, in my mind, this concept of empathy and stakeholder engagement and empathy and change management. You're doing a lot of those things too.

Steven

Yeah, when, you know, when you look and you study empathy, you know, you start to see somebody else's life through their lens or through their experiences. And they're not my experiences that, but they're my experiences, and if I can relate to them, then I will have a better understanding, and I will say through this process, not only me, but my board and my management team, we've leaned into other circles in our community that maybe we didn't, we didn't lean in before, and maybe we wouldn't have felt comfortable doing that, and now we've, if we've put our comfortability aside and put our empathy first, it allows us to lean in in a very genuine way and connect.

Heather

That's interesting to me, because I think you by default, I thought first about, well, gee, if I'm being a more empathetic leader, then I am helping them feel more comfortable. Yeah. But in some ways, what you're saying is you have to kind of fight a little bit of discomfort yourself being a more empathetic leader, and you're kind of stretching your own comfort zone that way, absolutely, is that.

Steven

That is, you've, you've articulated that very correctly, and you, you lean into other circles. And I said, for me, I leaned into other events and network with other people that I hadn't before, but now I'm listening, and I've got an empathetic, you know, approach to it, and I learn about their life and what's happening. And I really feel that that makes me a better, a better leader and a better, you know, working with my staff and what they have,

Heather

I think it comes across just talking to you too well. Thank you. You know, you make it easy to ask you questions and to just hear about your experiences. So outside of empathy, yeah, if you are going to give advice to another leader or another credit union about doing exactly what you are doing, leaning in to their communities, collaborating, convening and lifting people up. Now, what advice would you give to someone who was just sort of embarking on that impact journey.

Steven

Yeah, you know, I it does go back to the diversity of voices, and I really feel that that is really important. We all have our own life experiences. We will have our own biases. And so for me, it was and our whole team is listening and listening to others, and when you have other life experiences, you get to hear their perspective, as I said, from it differently. And that was that's been important for us as we built our board. We assess our board based upon their skill set,

and have very diverse skills and gender and ethnicities, but now we also ask them about life experiences, and we look at those life experiences on a survey, anonymous basis, and we see that now we have people from different social, economic situations, different life experiences, and they bring that into the boardroom and into the decision making process. And they're powerful voices, and they're in those voices. It's important to hear them and consider that in, as I said, in the decision making process,

Heather

And that's not just consulting with people that have the lived experience. That's representation. Yeah, right, yeah. Real representation of your membership or of your community all the way at the board level.

Steven

Yeah, an example. A couple years ago, we went through a rebranding campaign, and, you know, working with a consultant and narrowing down, and we had it all ready to go, and we were just ready to change our corporate colors and do all sorts of fancy stuff. And I met with our Hispanic Advisory Committee. This is a committee made up of members of our credit union. We work with them, and we consult with them, and we laid out this wonderful plan. We were ready to go marching down with this new process. And they said, well, you know, when we tell other family members about the credit union, we tell them to go to Banco Amarillo, the yellow bank. And I was like, we were just ready to take yellow out of our corporate colors. And I said, stop the press. I heard just that one little comment, that one little nugget, and I said, Stop the presses. We can't change this color scheme. We need to reconsider this based upon this feedback, because that simple phrase is connecting us to the community. Wow. And now yellow is a big, bold color in our color set. And again, it just shows to that sometimes you just get that little nugget from somebody's experience, and you've got to be attuned then to make and take action.

Heather

I love that story. Yeah. I mean, can you imagine how you can imagine, I can how that would have gone down, right, if you hadn't been listening, yeah, in that moment, and really listening empathetically, right? Not just discounting that comment, Oh, that's funny or whatever, but really saying, okay, no wait, that matters. That's important. We're not going to change that. Yeah, I love that story. Oh, good. Anything else that you want to share about your own leadership journey, your credit union, or even the award?

Steven

Well, you know my leadership journey. I've been very active in the international credit union movement, formally serving on the World Council of Credit Unions and as board chair, and that has also been the impetus for much of what we're doing is looking at what's happening around the world in those best practices. And we even heard that in the last couple days is, you know, look beyond, look beyond your local environment. See what's happening around the world. And that has led us to not only the initiatives of working in diversity and inclusion, but also now looking at environmental issues and how can we be good stewards of the planet? And I want to

say those have been very profound experiences for me. And then looking at what experiences of people are having in other countries, and that helps us with understanding that immigrant journey to the US as well, or refugee journey. And I would say. It's been a big contributor of my years.

Heather

I love that. That's a whole other interview that we need to do to talk about the international credit union experience and how it can bring just so much richness to all of our lives. Yeah. So okay, are you in?

Steven

I'm in for that because the learning experiences are wonderful, you know. And many times, those are things that are being tried in smaller scale or smaller bases, and they eventually make it our way. If you want to be ahead, that's that's the way to look.

Heather

And sometimes boards or other leaders aren't quite sure they understand how it's relevant, yeah, right, to have an international experience with other credit unions, or to learn about what's happening in the movement in other places. But there's always a way to bring it home like you know, it can enhance the local experience so much so so good. I'm looking forward to talking to you more about that. Yes, thank you, Steve. All right, you're really congratulations, and thank you for everything that you're doing on behalf of the rest of us. You're really leading your way well.