

Director of Leadership & Organizational Development

<p>Employee: Reports To: Vice President of Human Resources & Organizational Development</p>	<p>Department: Human Resources FLSA Status: Exempt Updated: January 2019</p>
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SUMMARY: In support of Sun Federal’s Vision, Mission, Values and Culture, the Director of Leadership & Organizational Development has dynamic and innovative leadership responsibility for developing, organizing and directing Credit Union’s Leadership Institute and Volunteer Development Program. Responsible for the onboarding of new employees and functional training of member service staff. Supports talent management through consultation, education/development curriculum and external resources. Develops and leads training team ensuring they are proactive, effective and highly integrated across the organization.

ESSENTIAL DUTIES & RESPONSIBILITIES

Employee must effectively carry out the following essential duties and responsibilities of this position in a manner that consistently demonstrates Sun Federal’s mission, values and culture. Other duties may be assigned.

1) Assumes responsibility for organizational learning and development.

- a. Leads Sun Federal’s Leadership Institute/University.
 - Designs Institute to advance a culture of leadership, learning, development and financial wellness.
 - Develops and delivers curriculum that includes Credit Union’s Mission, Supporting Principles and Core Values: Trust, Relationships, Excellence, Service and Teamwork.
 - Develops and delivers Leadership competencies curriculum: Communication, Business Acumen, Developing Others & Teams, Emotional Intelligence, Instilling a Shared Vision, Relationship Skills, Service Orientation and Strategic Agility.
 - Incorporates Gallup Strengths and Engagement modules in learning design.
 - Utilizes Sun Federal Management as faculty in delivery of Leadership Institute/University curriculum.
- b. Develops and leads an impactful learning environment that helps to attract, inspire, develop, engage and retain top talent.
- c. Develops and leads Management Development Program partnering with subject experts to ensure materials support internal policies and procedures.
- d. Develops and leads Volunteer Development Program and learning. Incorporates CPD online tools with Sun Federal materials.
- e. Monitors and evaluates training programs to determine application of learning, effectiveness and success. Identifies opportunities for improvement.
- f. Designs, develops and delivers instruction in multiple forms to accommodate audience as appropriate: classroom, e-learning, webinar, individual learning, and small group, etc.

2) Serves as Credit Union CML (Creating Member Loyalty) champion.

- a. Is a certified CML trainer for: Service, Referral, Sales and Sales Leadership Strategies.

- b. Ensures all new employees receive:
 - Basic CML training during onboarding/orientation.
 - CML Service & Referral training within six months of employment.
- c. Ensures all member contact employees receive CML Sales training within one year of employment.
- d. Ensures all management with member contact responsibilities receive SLS training within one year of obtaining management responsibilities.
- e. Develops and coordinates CML training schedule.
- f. Serves as resource for CML integration into new products and services training.

3) Assumes responsibility for the effective and efficient completion of Training functions.

- a. Develops and manages annual organization-wide training calendar.
- b. Manages the design of learning and development content for new and revised programs for areas such as orientation, member service, leadership development, management and volunteer development.
- c. Serves as CPD Online administrator and vendor contact. Monitors learning activities and outcomes.
- d. Monitors learning and development tools and resource allocation including creating and managing training budget.

4) Effectively supervises training department employees, ensuring optimal performance.

- a. Provides leadership to employees through effective coaching, engagement, delegation and communication. Conducts monthly staff meetings. Directs, schedules, and coordinates department functions.
- b. Ensures that Trainer(s) are well equipped, effective and optimally used. Identifies training needs and develops accordingly.
- c. Conducts performance appraisals as required. Formulates and implements corrective actions as needed. Sets individual goals and counsels on career development.
- d. Ensures that staffing levels are appropriate and human resources are effectively utilized. Interviews, hires, and assigns personnel.

5) Assumes responsibility for ensuring that professional business relations are established and maintained with members, vendors, trade professionals, etc.

- a. Ensures that questions and concerns are promptly and courteously resolved.
- b. Ensures that Credit Union policies and procedures are effectively conveyed.
- c. Ensures that the Credit Union's professional reputation and appropriate levels of confidentiality are maintained.
- d. Manages training and development related vendor relationships and budget.
- e. Represents the Credit Union with various trade professionals and groups.

6) Assumes responsibility for establishing and maintaining effective communication and coordination with Credit Union staff and management.

- a. Implements communication strategies to raise awareness and promote learning, development and overall leadership effectiveness.
- b. Partners and collaborates with cross-functional teams to build on existing learning programs, identify opportunities for organization-wide programs, and incorporate other best practices.

- c. Keeps the VP of HR & Organizational Development informed of leadership effectiveness, progress toward established objectives, and future learning and development opportunities.
- d. Completes required reports and records.
- e. Attends and participates in meetings and committees as required.

7) Assumes responsibility for related duties as required or assigned.

- a. Monitors learning and development industry trends and best practices.
- b. Analyzes training department effectiveness and adjusts learning content accordingly.
- c. Completes special projects and research studies as required.
- d. Ensures training and work areas are clean, secure, and well maintained.

Performance Measurements

- 1. Training goals are met and staff is knowledgeable and competent in respective job functions.
- 2. Training staff are well equipped, effective and optimally used.
- 3. Training activities are well coordinated and scheduled.
- 4. Training procedures are regularly reviewed and modified as needed. New training systems and resources developed and implemented as needed.
- 5. VP of HR & Organizational Development is appropriately informed of area activities and any significant concerns.

Expectations of Leadership

- 1) Supports and creates organizational awareness and models Sun Federal’s mission, vision and values. Fully embraces and lives Sun Federal’s culture.
- 2) Positively influences others by demonstrating commitment to Sun Federal’s Leadership Competencies: Instilling a Shared Vision, Strategic Agility, Emotional Intelligence, Communication Skills, Business Acumen, Relationship Skills, Developing Individuals & Teams and Service Orientation.
- 3) Actively models Sun Federal’s service behaviors and coaches employees to consistently embrace them.
- 4) Shows professionalism, empathy and respect in all interactions particularly with staff and members.
- 5) Takes personal responsibility to actively listen to the members, understand their needs and take initiative to help the member as your first priority. Every position at Sun Federal supports the member experience.
- 6) Responsible for personal leadership development through training, collaboration and teamwork. Understands and adheres to all policies, procedures and regulations.
- 7) Maintains knowledge of regulations appropriate for position (i.e. Bank Secrecy Act, OFAC, etc.) and attends all training as it relates to position related regulations.
- 8) Adheres to Sun Federal’s security procedures and safeguards member information.
- 9) Demonstrates professionalism in dress, behavior and communication.
- 10) Consistently promotes and acts as part of a cohesive team, demonstrating excellent interpersonal skills and the ability to interact positively with others. Maintains open and respectful communication. Handles conflict directly, discreetly and gracefully.
- 11) Collaborate, contribute, and communicate for the success of the team. Invite and accept feedback from others and provide upward feedback.

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of knowledge, skill and/or ability required. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions. The individual must be able to successfully pass background checks.

QUALIFICATIONS

EDUCATION/CERTIFICATION:	Bachelor's degree in Adult Learning, Organizational Development, Education or related field. Master's degree preferred. Certified CML Trainer.
REQUIRED KNOWLEDGE:	Understanding of Adult Learning Design/Application.
EXPERIENCE REQUIRED:	Five (5) to eight (8) years adult learning facilitation. At least five (5) years' experience directly leading and managing teams.
SKILLS/ABILITIES:	Ability to compile, organize and present information clearly and concisely. Strong leadership, supervisory and interpersonal skills. Well organized and attentive to detail. Creative and self-motivated. Advanced organizational, planning and time management skills. Ability to plan, develop and implement training programs. Advanced communication skills. Expert skill in speaking and/or presenting in front of groups in a professional setting. Ability to travel as needed.

PHYSICAL ACTIVITIES AND REQUIREMENTS

TALKING:	Especially where one must frequently convey visionary and/or detailed or important information accurately.
AVERAGE HEARING:	Able to hear average or normal conversations and receive ordinary information.
REPETITIVE MOTION:	Movements frequently and regularly required using the wrists, hands, and/or fingers.
AVERAGE VISUAL ABILITIES:	Average, ordinary visual acuity necessary to prepare or inspect documents or products, or operate machinery.
PHYSICAL STRENGTH:	Medium work; exerts up to 50 lbs. of force occasionally; and/or up to 20 lbs. frequently, 10 lbs. constantly.

WORKING CONDITIONS	No hazardous or significantly unpleasant conditions (such as in a typical office). Frequent local travel and occasional out of state travel required.
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MENTAL ACTIVITIES AND REQUIREMENTS

REASONING ABILITY:	Ability to apply logical or scientific thinking to define problems, collect data, establish facts, and draw conclusions. Ability to interpret a variety of technical instructions and can deal with multiple variables.
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MATHEMATICS ABILITY: Ability to compute discount, interest, profit and loss; commission markup and selling price; ratio and proportions and percentage.
Ability to perform very simple algebra.

LANGUAGE ABILITY: Ability to read periodicals, journals, manuals, dictionaries, thesauruses, and encyclopedias.
Ability to prepare business letters, proposals, summaries, and reports using prescribed format and conforming to all rules of punctuation, grammar, diction, and style.
Ability to conduct training, communicate at panel discussions and to make professional presentations.

JOB DESCRIPTION INTENT & PURPOSE

Job descriptions assist organizations in ensuring that the hiring process is fairly administered and that qualified employees are selected. They are also essential to an effective appraisal system and related promotion, transfer, layoff, and termination decisions. Well-constructed job descriptions are an integral part of any effective compensation system.

All descriptions have been reviewed to ensure that only essential functions and basic duties have been included. Peripheral tasks, only incidentally related to each position, have been excluded. Requirements, skills, and abilities included have been determined to be the minimal standards required to successfully perform the positions. In no instance, however, should the duties, responsibilities, and requirements delineated be interpreted as all inclusive. Additional functions and requirements may be assigned by managers as deemed appropriate.

In accordance with the Americans with Disabilities Act, it is possible that requirements may be modified to reasonably accommodate disabled individuals. However, no accommodations will be made which may pose serious health or safety risks to the employee or others or which impose undue hardships on the organization.

Job descriptions are not intended as and do not create employment contracts. Sun Federal maintains its status as an at-will employer. Employees can be terminated for any reason not prohibited by law.

Employee Signature

Date