

Job Title: HR and Training Officer
Date Prepared: December 2020
Job Code:
Supervisor Title: Chief Executive Officer
Department: Executive
Division: Human Resources
Status: Full time, Exempt

PURPOSE:

The HR and Training Officer is responsible for planning and leading all credit union activities related to the Training or Human Resources function:

- I. Leads the HR strategy: Acquiring and managing talent, driving competitive compensation, leading the benefits strategy and programs, developing training and leadership opportunities, creating a culture of inclusion and employee engagement, working with individual departments to address unique issues, and supporting employee relations.
- II. Leads training efforts to support and further the strategic goals and objectives of the credit union, including new hire orientation, sales training, and other training as needed.

ROLES AND RESPONSIBILITIES:

1. Lead the development, implementation, and coordination of policies, procedures and programs covering critical HR initiatives including recruitment, on-boarding employees, learning and development, leadership development, performance management, compensation/incentive plans and benefits planning. Creates a work environment that promotes teamwork, performance feedback, recognition, mutual respect, and employee satisfaction.
2. Work closely with the Executive team acting as a trusted advisor to achieve strategic and financial objectives.
3. Regularly assess the competitiveness of HR programs and practices against the relevant markets and drive initiatives for improvement and change.
4. Consult with management staff regarding performance issues, and disciplinary action. Utilize a consistent approach of educating and supporting managers during coaching, discipline, or termination. Ensure a respectful experience for employees. Review and approve all terminations, involving legal counsel when appropriate.
5. Work with leaders and employees to establish and maintain a positive work environment, which encourages the full use of diverse talent and abilities, act as an employee advocate.
6. Review and analyze market, industry best practices, trends, and internal feedback to develop competitive compensation programs to meet business goals and drive employee satisfaction.
7. Continuously improve employment branding and engagement survey instruments. Works with stakeholders and vendors to conduct organizational research including biennial Employee Opinion Survey and Market Compensation Study.
8. Monitor the effectiveness of staff training and development programs in building and maintaining staff performance, preparing employees for more significant responsibilities, and providing general business development programs to enhance employee knowledge and understanding of the business of the organization and industry.
9. Oversee the development and management of the human resource information systems (HRIS) database and production of necessary reports for critical analyses of the HR function and the human resources of the organization.
10. May serve as a trustee, plan administrator or fiduciary for certain benefit programs. Serve as SAFE Act (Secure and Fair Enforcement for Mortgage Licensing Act of 2008) Officer and oversee the management of Credit Union compliance with the SAFE Act.

COMPETENCIES:

STRATEGIC THINKING: Understands the organizational strengths and weaknesses, clarifies opportunities and threats in the external environment, identifies trends and opportunities to enhance business performance, and provides focus and direction for organizational and individual action. Recognizes viable creative ideas of others and brings them to the table and to those in a position to implement them. Recognizes strategic opportunities for change.

MANAGING VISION & PURPOSE: Communicates a compelling and inspired vision, sense of core purpose and goals. Makes the vision shareable by everyone. Can inspire and motivate entire units or organizations. Inspires others with a strong sense of purpose and convinces them of the need and urgency to wholeheartedly give their support and drive results. Clearly defines goals and the contributions of departments towards those goals.

DECISION MAKING: Has the knowledge and continues to expand/update knowledge (including regulatory changes) to be excellent at making decisions based on input from others and confidence in own knowledge base. Demonstrates excellent judgement while under pressure and is truly understanding of the need to make timely and quality decisions.

TEAM BUILDING: Develops staff and others through mentoring and coaching. Encourages cooperation, is approachable and builds relationships that support cross functional team building. Sets a strategy that gives all departments clear goals and an understanding of how to work together to achieve them.

MEMBER FOCUS: Inspires appreciation of the member and sets a high standard for product quality, product delivery and member service. Ensures that strong continuous relationships are formed with members. Manages a process for member communication and uses their feedback to improve.

MISCELLANEOUS: Performs all other related duties as assigned.

REPORTING STRUCTURE:

This position reports to the Chief Executive Officer (CEO).

QUALIFICATIONS:

- SHRM-SCP, SPHR certification and/or specialized training in employee relations, safety, labor relations.
- Five (5) years' experience in human resources field; preferably financial industry.
- Two (2) years' experience in training field; preferably financial industry.
- **LEADERSHIP:** Must possess strong leadership and management skills that facilitate excellence, teamwork and collaboration.
- **INDUSTRY KNOWLEDGE:** Working knowledge of financial services, investments, asset and liability management, budget development, financial statements and HR related regulations required.
- **COMMUNICATION:** Must demonstrate superior written and oral communication skills, as well as strong organizational and analytical skills.
- **SOFTWARE:** Proficiency in Microsoft Word, Excel, PowerPoint and Internet.

PHYSICAL REQUIREMENTS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

How much on-the-job time is spent in the following physical activities?

Activity	Never 0%	Occasionally 1- 30%	Frequently 30-70%	Constantly 70-90%
Standing		X		
Walking		X		
Sitting			X	
Talking, Hearing			X	
Feeling, Grasping		X		
Climbing, Balancing	X			
Crouching, Crawling, Kneeling		X		
Reaching with Hands & Arms		X		
Tasting, Smelling	X			
Keyboarding / Data Entry			X	
Driving		x		

Does this job require that weight be lifted or force be exerted?

Activity	Never 0%	Occasionally 1-30%	Frequently 30-70%	Constantly 70-90%
Up to 10 pounds		X		
Up to 50 pounds		X		
Up to 100 pounds	X			
More than 100 pounds	X			

Does this job have any special vision requirements?

Activity	Never 0%	Occasionally 1-30%	Frequently 30-70%	Constantly 70-90%
Looking at Computer Screen				X
Color Vision (identify and distinguish colors)		X		
Peripheral, Depth Perception		X		
Ability to Adjust Focus		X		

How much exposure does this job have to the following environmental conditions?

Activity	Never 0%	Occasionally 1-30%	Frequently 30-70%	Constantly 70-90%
Toxic Chemicals	X			
Moving Parts	X			
Electrical Shock Risk	X			
Explosives	X			
Fumes	X			
Blood, Body Fluids	X			
Extreme Heat (non-weather)	X			

Extreme Cold (non-weather)	X			
Severe Hot Weather	X			
Severe Cold Weather	X			

How much noise is typical for this job's work environment? (*Bold the text of your selection*)

Very Quiet – Example: Forest trail, isolation booth for hearing test.

Quiet – Example: Library, private office.

Moderate Noise – Example: **Business office w/ typewriters / printers, light traffic.**

Loud – Example: Metal can manufacturing, large earth moving equipment. Very Loud

Noise – Example: Jack hammer work, front row rock concert.

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