

POSITION SUMMARY

Under the general supervision of the Human Resources Manager, the ETF Learning & Development Officer is responsible for overseeing the Learning & Development Section (L&D) in the Office of Talent Management (OTM). This position directs and implements agency-wide training and performance management programs and supervises L&D permanent and contract staff. This position assesses training needs across the organization and leads strategic planning for ETF’s training and performance management initiatives. The ETF Learning & Development Officer develops policies and procedures to improve operational efficiency and enhance L&D services to the agency. In addition, this position develops and manages the agency’s learning and development budget and monitors contracts with outside training providers.

The ETF Learning & Development Officer collaborates with and provides consultation to executive and senior management teams, including division administrators and office directors, regarding training and performance needs, priorities, and activities. Furthermore, this position is in frequent communication with the Office of the Secretary, area supervisors, the L&D team, the Human Resources team, ETF staff, and colleagues in other state agencies. These duties require the ability to communicate concepts and information to a wide range of diverse audiences. The ETF Learning & Development Officer must be able to help build a culture of learning that encourages professional growth among ETF employees.

The Wisconsin Department of Employee Trust Funds is a medium sized, non-shared services agency administering the Wisconsin Retirement System and related benefit programs to over 630,000 members receiving \$5.6 billion in retirement benefits and \$1.6 billion in health benefits annually. This position directly supports the agency strategic goal focused on building a talented and agile workforce necessary for achieving the Department’s mission to develop and deliver quality benefits and services to our members while safeguarding the integrity of the Trust. As an employee of ETF, the incumbent will support and create a diverse and inclusive workforce.

GOALS AND WORKER ACTIVITIES

35% GOAL A: **Direction and oversight of employee training and performance management programs**

- A1. Direct the development and implementation of quality training and performance management programs across the agency to support high levels of learning outcomes and employee performance. Do so within agreed resources and timescales.
- A2. Manage training and performance management projects. Establish workplans, assign tasks, and ensure that project milestones are completed in a timely manner.
- A3. Engage with senior management to clarify organizational requirements, set priorities for learning and development interventions, and define required outcomes.
- A4. In collaboration with the Secretary’s Office and the ETF management team, lead the analysis of agency-wide and division-level learning needs.

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- A5. Counsel ETF leadership on training and performance activities and policies as they affect ETF employees.
- A6. Evaluate training and performance management programs and solicit feedback from participants. Conduct periodic briefings with management on the effectiveness of ETFs training and development programs. Make changes and improvements when possible.
- A7. Select and implement tools designed to enhance ETF's training and performance management programs. Collaborate with ETF management, IT, and division training contacts to explore new learning approaches, technology, and resources for training programs (e.g., distance learning, mentoring, peer instruction, job exchange, etc.).
- A8. Research, develop, and monitor market learning opportunities to ensure maximum participation of ETF employees in training program courses.
- A9. Oversee and approve all training requests.

25% GOAL B: Strategic planning and development of process, policies, and procedures

- B1. Develop and implement an agency-wide training and performance management strategy. Anticipate trends, challenges, and opportunities, ensuring alignment with ETF's strategic plan.
- B2. Look ahead for future possibilities and translate them into achievable action items.
- B3. Evaluate ETF's current training and development efforts, identify gaps, and define short-term and long-term goals and visions for the future.
- B4. Plan and prioritize work of L&D staff to meet established goals. Make agile plans that account for a range of risks and contingencies.
- B5. Identify and implement business process changes to improve operational efficiency and enhance services.
- B6. Improve existing policies and procedures for training and performance management.
- B7. Develop new policies and procedures for employee training and performance management and oversee their implementation. Ensure documentation of these new policies and procedures.
- B8. Collaborate with ETF management and Office of Communications to ensure effective messaging about policies and procedures to ETF staff.

20% GOAL C: Supervision of Learning & Development Section staff

- C1. Evaluate and modify staffing level, composition, and schedules as necessary to meet operational needs and department priorities.
- C2. Recommend and initiate personnel actions including the recruitment and selection of staff, reclassifying positions, and handling terminations as needed.
- C3. Develop and implement goals, objectives, and expectations for each staff member supervised through the performance management process. Monitor and evaluate staff performance in accordance with the agency's performance management process.
- C4. Ensure adherence to the agency's equity and inclusion initiatives as well as health and safety programs.
- C5. Define and maintain roles and responsibilities within the team.
- C6. Oversee day-to-day activities and work assignments. Organize, prioritize, and monitor learning and development work effectively to meet key milestones and business objectives.
- C7. Foster a collaborative and productive work environment that encourages innovation and professional growth. Emphasize a culture of continuous improvement.
- C8. Meet continually with L&D staff to understand their individual development interests and professional growth goals. Provide opportunities for development when available.

15% GOAL D: Budget management & contract monitoring

- D1. Prepare the agency's learning and development budget.
- D2. Collaborate with ETF Budget Manager to conduct the annual internal training budget request process.
- D3. Gather training budget requests across the agency from business areas. Review and prepare budget requests for executive team. Provide recommendations for approvals, denials, or alternative learning solutions.
- D4. Oversee the agency external learning request process to ensure approved training requests result in registrations of external training events.
- D5. Manage department request for proposals and simplified bids for contracting with outside training vendors. Negotiate cost of training with vendors to secure cost-effective training.
- D6. Review non-standard requests for external training and conferences. Approve or deny as appropriate and consult with executive leadership if needed.

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- D7. Coordinate cost analysis by tracking training expenditures and revenues.
- D8. Manage purchases and payments generated using P-cards or other payment methods.

5% GOAL E. Performance of other duties as assigned

- E1. Administer training programs as needed.
- E2. Serve as a consultant on the coordination of statewide meetings and technical trainings.
- E3. Maintain department training information on Share Point site. Develop training resources and post on Share Point.
- E4. Lead the ETF Learning and Development Workgroup meetings.
- E5. Provide consultation to division managers and administrators in the planning, budgeting, and implementation of conferences, program-specific training events, management meetings, and staff meetings.
- E6. Perform other duties as assigned.

(Revised 2/8/2024)

KNOWLEDGE, SKILLS, AND ABILITIES

1. Knowledge of staff development and training techniques
2. Ability to design and implement adult training programs that take individual learning differences into account
3. Knowledge of methods and techniques to assess training needs
4. Knowledge of information technology training formats and designs, including on-line and distance learning methods
5. Highly developed leadership and managerial skills
6. Ability to build a culture of learning and recommend and facilitate activities that help people grow
7. Excellent interpersonal skills to be able to coach and counsel managers
8. Ability to establish and maintain effective working relationships with agency program managers, employees, professional staff in other agencies, and external training providers
9. Ability to create strategic plans that are in alignment with organizational goals
10. Ability to analyze data trends to help guide decision making
11. Ability to prioritize and manage multiple tasks and deadlines simultaneously
12. Knowledge of policy development and implementation methods and techniques
13. Skilled in developing and managing a budget
14. Ability to develop and deliver multi-mode communications that convey a clear understanding of the unique needs of different audiences
15. Skilled in delivering group presentations
16. Skilled in leading effective meetings. Ability to coordinate group discussions and facilitate group decision making.
17. Ability to analyze and interpret complex information
18. Knowledge of project management methods and techniques
19. Ability to secure and deploy resources effectively and efficiently
20. Ability to use personal computer-based software systems (e.g., Microsoft Office applications such as Word, Excel, Access, PowerPoint, OneNote, etc.)
21. Ability to use complex computer programs (e.g., PeopleSoft, Cornerstone, or other learning management systems)
22. Ability to maintain confidential information in accordance with policies, guidelines, and direction from manager
23. Ability to understand and comply with all ETF and enterprise security standards, policies, processes, and procedures