



Job Description

Job Details

Job Title: Director of Financial Inclusion and Community Engagement

Department: HROD

Reports To: VP of DEI & Community Engagement

FLSA Classification: Exempt

Date Created: 2017/07/11

Salary Grade: 14

ID: DOCP

Date Last Updated: 01/01/2023

General Purpose of Position

The Director of Financial Inclusion and Community Engagement has leadership responsibility for the organization's Financial Inclusion and Education and Community Engagement initiatives. This position is responsible for the cultivation of strategic relationships with non-profit, community and campus partners to deliver on the organization's social mission and growth strategies. The position leads organizational efforts to ensure employee engagement through community volunteerism, employee giving campaign participation and UWCU social mission awareness. This position leads the strategy of UWCU's Financial Inclusion and Education delivery and ensures its successful execution. A member of the DEI Leadership Team, it actively provides input into organizational policies and practices. This includes but not limited to supporting DEI coaching initiatives to help leaders toward authentic, actionable, and inclusive practices. This position also works closely with HROD, Marketing and MS&S partners to ensure alignment with organizational goals.

Must effectively carry out the essential duties of this position in a manner that consistently demonstrates the core values of the Organization in a positive manner.

Core Values

Act in the Members' Best Interest

Treat members equitably, with care and respect. Empower employees to act in the best interest of the members and for the long-term success of the organization. Build trust among members by consistently delivering good value and service.

Respect People

Treat others with dignity, pursuing equity for all and making the most of each person's talents, identities, goals, perspectives and experiences. Promote balance between work and personal life by recognizing the importance of relationships and priorities in each other's lives. Cultivate work environments that are welcoming and safe for all by creating a culture of allyship.

Value Teamwork

Work collaboratively and cooperatively to achieve common goals and celebrate collective successes. Support our team through individual accountability and commitment. Draw power, strength and creativity from our diversity.

Deliver Quality

Embrace innovation and change as a means of renewal and continuous improvement. Recognize and reward excellence.

Foster Continuous Learning

Mentor each other by sharing knowledge, perspective and experience. Provide ways for all employees to grow and advance professionally. Take accountability for our own personal and professional development.

Essential Duties & Responsibilities - Summary

The duties identified below are the essential functions of the position. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Title and Definition	Weight
Community Engagement - Madison Market	30 %
Financial Inclusion and Education	30 %
Employee Community Engagement Initiatives	20 %

Leadership Expectations

20 %

Essential Duties & Responsibilities - Defined**Title and Definition****Weight****Community Engagement - Madison Market**

• Serves as primary Madison market external ambassador for UWCU with partner campuses, nonprofits, and stakeholders. Builds mutually beneficial relationships that advance UWCU's social mission and elevates the organization as a community focused financial institution partner.

• Ensure UWCU is represented at significant external events and forums and raises UWCU awareness by serving on select nonprofit organization board and committees.

• Identifies and establishes relationships with key strategic partners who are delivering innovative approaches to decreasing disparities among underserved populations in the Madison community, and whose work aligns with UWCU's community support pillars.

30 %

• Work closely with Director of DEI and Community Engagement (Milwaukee) to create alignment of strategy and activities across all markets.

• Works closely with HR, Marketing, MS&S and other division leaders to engage organization's resources in efforts to deepen existing partnerships and to raise awareness of those relationships.

• Serves as a representative on the UWCU Community Giving Committee.

Financial Inclusion and Education

• Provide oversight to UWCU's Financial Inclusion and Education initiative, ensuring that it delivers a high standard of accessibility and relevance.

• Collaborate with HR and Financial Inclusion and Education Manager to deliver on an effective UWCU employee financial literacy benefit.

• Elevate the visibility of UWCU's unique Financial Education offering to members and internal and external partners and stakeholders.

30 %

• In collaboration with the Financial Inclusion and Education Manager, Data Analytics and Marketing, develop and implement methods to measure the effectiveness of UWCU's financial education efforts in order to deliver on improved outcomes.

• Ensure that financial education efforts are providing benefit to underserved and excluded populations and are aligned with organizational DEI Strategy.

Employee Community Engagement Initiatives

• Provide leadership to ensure UWCU's volunteer benefit (VTO) is accessible and engaging for all employees measured by annual participation data.

• Increase the number of organizational leaders who serve on nonprofit organizations' boards and committees.

• Lead the coordination and implementation of the annual employee giving campaign. Work to increase meaningful participation and make recommendations for improvements.

• Work closely with DEI and HR Leadership teams to incorporate EES findings into existing strategy and develop new approaches to meet emerging employee need.

20 %

• In collaboration with Marketing, HR and other division leaders, elevate the recognition of those employees who exhibit a commitment to community volunteerism.

• Provide robust support to VP of DEI and Community Engagement, DEI Manager, Executive Sponsors and leaders in the area of ERG program development and improvement.

Leadership Expectations

Responsible for inclusive excellence, essential leadership duties, and the development of team and self while continuously striving to achieve UWCU's goals, strategies & critical measures.

- Personal Responsibility and Accountability – Build trust with the team inspiring growth and development while striving to make a positive impact on the business.
- Effective Communication – Communicate inclusively and transparently, aligning work in a manner that reinforces UWCU's vision, mission, core values and goals. Uses social and emotional intelligence to navigate conflict, strengthen relationships and solve complex problems.
- Focus on Teamwork – Encourage others to authentically bring their true self and skills to work, aligning them with the strategic goals of the team and organization. Recognize and reward individual and team efforts reinforcing the positive impacts to the team and organization.
- High-Performance Mindset – Committed to operational excellence and improvement in the areas of compliance, organizational processes, and employee experience. Consistently meets or exceeds milestones and deadlines.
- Business Acumen – Is a student of our business by understanding emerging industry trends competitor knowledge and how own functional area contributes to the organization. Uses strategic plan, critical measures, and data to recommend change and to execute plans to achieve organization effectiveness and strategic priorities.
- Inclusive Excellence – Foster a collaborative and innovative team. Set the tone and model behaviors that create an environment where others feel valued, respected, a sense of belonging, and the ability to positively contribute. Creates equitable access to development and career growth.
- Recruitment and Retention – Recruit and retain top talent. Develop diverse talent pipelines, aligning with UWCU's Diversity, Equity, and Inclusion strategy. Consistently utilizes coaching and development as an engagement, retention, and inclusion strategy.
- Change Leadership – Views change as a necessary constant and positions it in a way that creates engagement and capitalizes on opportunities for individual and team growth and development.
- Coach Approach – approaches people leadership from a place of curiosity and growth mindset, providing continuous feedback focused on employee development. Invites feedback from all directions; recognizing growth and development are a daily process.

20 %

Qualifications

To perform this job successfully, an individual must demonstrate regular, predictable attendance and be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. The individual must be able to successfully pass background checks.

Must maintain a valid license and vehicle liability insurance in the minimum amounts required by law. This information must remain current and on file with Human Resources.

This individual must have the ability to travel and work in various locations throughout the credit union network, as needed.

Must be able to work nights and weekends, and available for presentation events with little notice.

Education

Degree/Diploma Obtained	Program of Study	Required/Preferred
Bachelors	Business Administration, Finance, Management, or a related field	Required

Additional Requirements

Experience

Years of Experience	Type of Experience	Required/Preferred
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10+ years experience

Business Development

Required

Additional Experience

Skills

Title and Description	Weight (NA)
Demonstrated abilities to influence, lead/motivate, and build networks.	0 %
Excellent written and verbal communication skills as demonstrated by the ability to write clear, concise documentation, memos and email, and facilitate staff meetings and give presentations.	0 %
Demonstrated skill in the planning of multiple projects and initiatives.	0 %
High level of customer service orientation, general business acumen, and human relations skills.	0 %
Ability to positively interface with management, employees, corporate staff and outside partners.	0 %
Highly innovative, creative, and able to articulate strategic direction.	0 %
Skilled in public speaking and be comfortable presenting to large and diverse groups.	0 %
Experience and well-developed knowledge related to financial literacy and personal money management.	0 %

Additional Skills

Physical Requirements

Ability to work in a typical office environment involving exposure to fluorescent lighting, potential ink fumes, contact with synthetic materials and air conditioning.

Ability to sit and/or stand for: (hrs)	Ability to type at a computer for: (hrs)	Ability to lift: (lbs.)
Up to 8 hours		

Additional Physical Requirements

Must hold a valid driver's license and have the ability to sit and drive for extended periods.

Supervisory Responsibility

This person directly supervises and coaches the Community Partnerships Coordinator. Supports retail branch management in coordination with senior retail leaders.

Language Skills

Language	Required / Preferred
English	Required

Contacts

Weight (NA)

Position has frequent contact with all levels of staff, strategic partners, campus officials, government agencies, professional groups and job candidates.

0 %

Additional Contacts

Disclaimer

This description is subject to change at the discretion of management without notice and at any time. The duties contained in this description may be added to depending upon the needs of the department. This document provides a general guideline for the nature and level of work performed by employees within this classification and should not be construed as a comprehensive inventory of all duties, responsibilities, and qualifications for employees assigned to this job.