



America's  
Credit  
Unions

# HR & ORGANIZATIONAL DEVELOPMENT

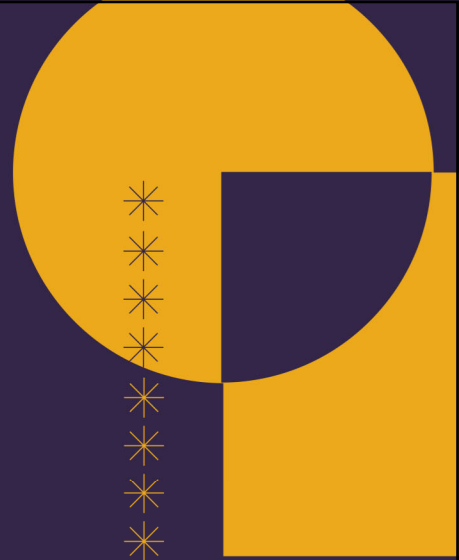
Council Conference

BUILDING BENCH STRENGTH THROUGH  
INTENTIONAL DEVELOPMENT

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Wednesday, April 29, 2026



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# Themes

Building Bench Strength Through Intentional Development

- **Purpose:** Strategic clarity throughout the organization
- **Competencies:** Foundational talent capabilities for a strong pipeline
- **Intentionality:** Focused efforts for greatest impact
- **Proactiveness:** Self-driven development for continuous learners
- **Framework:** Practical tools for building bench strength

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Category	Builders Born: 1925-1945	Baby Boomers Born: 1946-1964	Generation X Born: 1965-1979	Generation Y Born: 1980-1994	Generation Z Born: 1995-2009	Gen Alpha Born: 2010-2024
Slang terms	We prefer proper English if you please	Be cool Peace Groovy Way out	Dude Ace Rad As if Wicked	Bling Funky Doh Foshizz Whattsup?	Fam GOAT Slay Yass queen	lit yeet hundo oof rn ldr
Social markers	World War II 1939-1945	Moon landing 1969	Stock market crash 1987	September 11 2001	GFC 2008	COVID-19 2020
Iconic cars	Model T Ford First 1907	Ford Mustang 1964	Holden Commodore 1978	Toyota Prius 1997	Tesla Model S 2012	Autonomous vehicles 2020s
Iconic toys	Roller skates	Frisbee	Rubix cube	BMX bike	Folding scooter	Fidget spinner
Music devices	Record player LP, 1948	Audio cassette 1962	Walkman 1979	iPod 2001	Spotify 2008	Smart speakers Now
Leadership style	Controlling	Directing	Coordinating	Guiding	Empowering	Inspiring
Ideal leader	Commander	Thinker	Doer	Supporter	Collaborator	Co-creator
Learning style	Formal	Structured	Participative	Interactive	Multi-modal	Virtual
Influence Advice	Officials	Experts	Practitioners	Peers	Forums	Chatbots
Marketing	Print (traditional)	Broadcast (mass)	Direct (targeted)	Online (linked)	Digital (social)	In situ (real-time)

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# New Workforce Expectations



New workforce expectations, driven largely by Gen Z and post-pandemic shifts, demand a focus on flexibility, mental health, purpose, and continuous professional growth over traditional, solely salary-driven compensation. Key trends include a preference for hybrid work, a rejection of "hustle culture" for work-life balance, and expectations of ethical, diverse, and tech-forward workplaces.



- Google AI Summary

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## Purpose

Strategic clarity throughout the organization

**(Culture + Clarity + Alignment)**

**x Execution**

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**High Performance**

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## Takeaways

Purpose

- Boil down the most important aspects of your unique purpose and strategy
- Communicate it intentionally and relentlessly, starting with hiring
- Build leaders who embrace it and utilize it day-to-day within their areas

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# Pitfalls

Purpose

- Beautifully articulated strategy that isn't internalized
- Fractured priorities

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## Competencies

Foundational talent capabilities for a strong pipeline

# Example Competencies

- Strategic Thinker
- Collaborative
- Effective Communicator
- Effective Decision Making
- Adaptive
- Opportunity Management
- Coaching Mindset
- Focused Innovation
- Respectful Candor
- Develops Talent
- Multidimensional Thinker
- Influencer
- Intuitive
- Insightful Curiosity
- Results Oriented Execution
- Focused Innovation
- Compassionate Enforcing
- Critical Thinker
- Resilience
- Mentor

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# Definitions

Competencies

## Example - Resilience

Staying energized, productive, and focused in the face of challenges, ambiguity, change or strenuous demands, creating a supportive environment that helps others become more resilient and productive.

- Models an environment of high energy, enthusiasm and optimism, despite high demands or difficult workloads
- Develops organizational practices or policies to mitigate disruptive or stressful situations for staff
- Creates a work environment in which wellness and balance are valued
- Expresses appreciation for the demands placed on employees, encouraging them to continually overcome challenges

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# Takeaways

## Competencies

- Must be aligned with the purpose and strategy
- Must have a common definition for each competency
- Be as clear as possible to understand what success looks like
- Often customized for different roles and levels within the organization
- Start simple
- Incorporate competencies into hiring, development programs, and evaluations

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# Pitfalls

## Competencies

- The talent pipeline isn't primed to move the organization forward
- Managers promote and develop competencies that aren't key to the strategy
- Too much reliance on skills development

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# Group Exercise and Menti

Competencies

## Purpose

- Ensuring that our community has access to fair financial services, including the most vulnerable

## Strategy

- Increase our ability to allow x% more credit access for those typically denied
- Improve our training and retention to provide dependable, accurate information and answers to our members fast
- Reduce friction and complexity so members engage with us easily and employees focus on high-value guidance

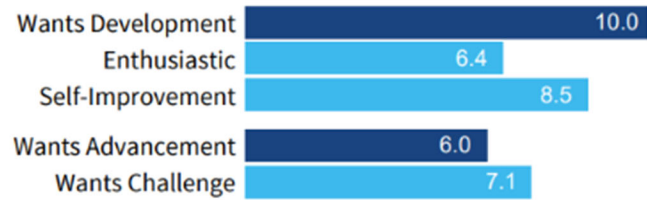
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## Intentionality

Focused efforts for greater impact

### Development Expectations



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### Development Plan Insights

- Incorporate these concepts into your existing employee development process
- Define what the development plan should look like, especially if it is different from other tools, like career pathing
- Consider keeping it simple
- Include timelines and clear measures of success. Avoid only measuring that action steps are taken – also ensure that new skills and competencies are embodied
- Celebrate the successes!

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# Takeaways

Intentionality

- The organization doesn't necessarily need to do more – efforts should be focused on people who are interested
- Ensure managers have the skills to have initial conversations to determine who is interested in development, including in other areas
- Ensure the team knows that development options are available and how to make use of them

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# Pitfalls

Intentionality

- Spending precious resources on individuals who aren't interested in being developed
- Not being open to moving people to other areas that are a better fit

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# Proactiveness

Self-driven development for continuous learners



# Feedback

## About one-in-four workers say they rarely or never get feedback from their manager

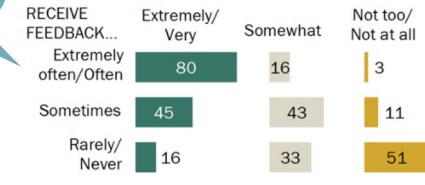
% of employed adults saying they receive feedback on how they're doing their job from their manager or supervisor ...

The more feedback is received the more satisfied employees are with the amount of feedback

66% of employees don't receive enough feedback



% of employed adults saying they are \_\_\_ satisfied with the amount of feedback they receive based on how often they receive feedback



Note: Based on workers who are not self-employed. Share of respondents who didn't offer an answer not shown. Source: Survey of U.S. workers conducted Feb. 6-12, 2023. "How Americans View Their Jobs"

PEW RESEARCH CENTER

Source: <https://www.pewresearch.org/social-trends/2023/03/30/how-americans-view-their-jobs/#how-workers-are-experiencing-the-workplace>

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# Takeaways

Proactiveness

- Set the expectation for employees to drive their own development
- Take much of the onus for employee development off HR and managers, while still providing valuable feedback
- Ensure there is a clear process that employees and managers understand
- Provide a central location for development offerings

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# Pitfalls

Proactiveness

- Lack of...
  - Clarity around the process for self-driven development
  - Clarity about the handoff from manager to employee – manager vs. employee responsibilities
  - Measures of success/benchmarks
  - Proactive and timely feedback from the manager to the employee
- Not sunsetting other competing development programs

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# Discussion Questions

Proactiveness

- Employees driving their own development:
  - What has been successful for your credit union?
  - What innovative ideas do you have?

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# Framework

Practical tools for building bench strength

## Set Clear Expectations

### For Example:

- This is an environment of continuous change and learning. You will be expected to learn new skills
- We are an agile organization. Change is part of our culture
- We offer excellent development opportunities to those who are willing to drive their own development
- We are open to lateral moves for better fit or gaining experience
- Leaders are expected to provide ample, timely, actionable feedback

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# What gets in the way?

- Too many meetings
- Focus on production
- Project work
- Not having time
- Faster to do it myself
- Too many priorities
- Team not ready
- Don't want to put too much burden on my team
- Desire to be helpful
- Lead by example
- Show my team I am willing to do the work
- Don't want to make a mistake
- Prefer control or feel like need control
- Don't want to be surprised

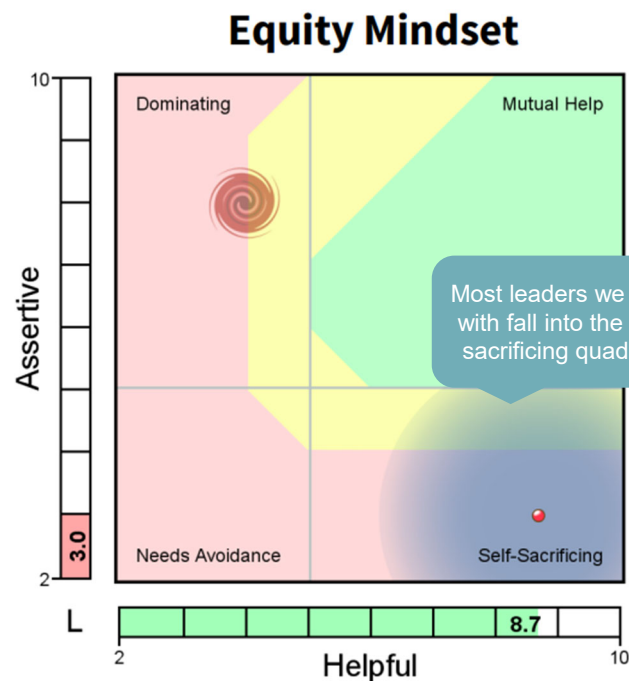
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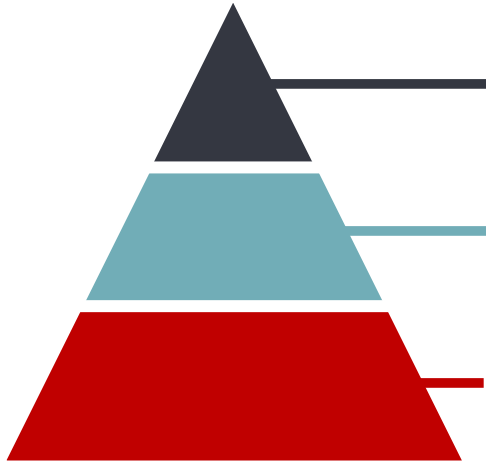
Harrison Assessment looks at behavioral preferences and tendencies.

*Equity Mindset Definition:*

*The tendency to assert one's needs and responds to others needs*



## 3 Levels of Decisions

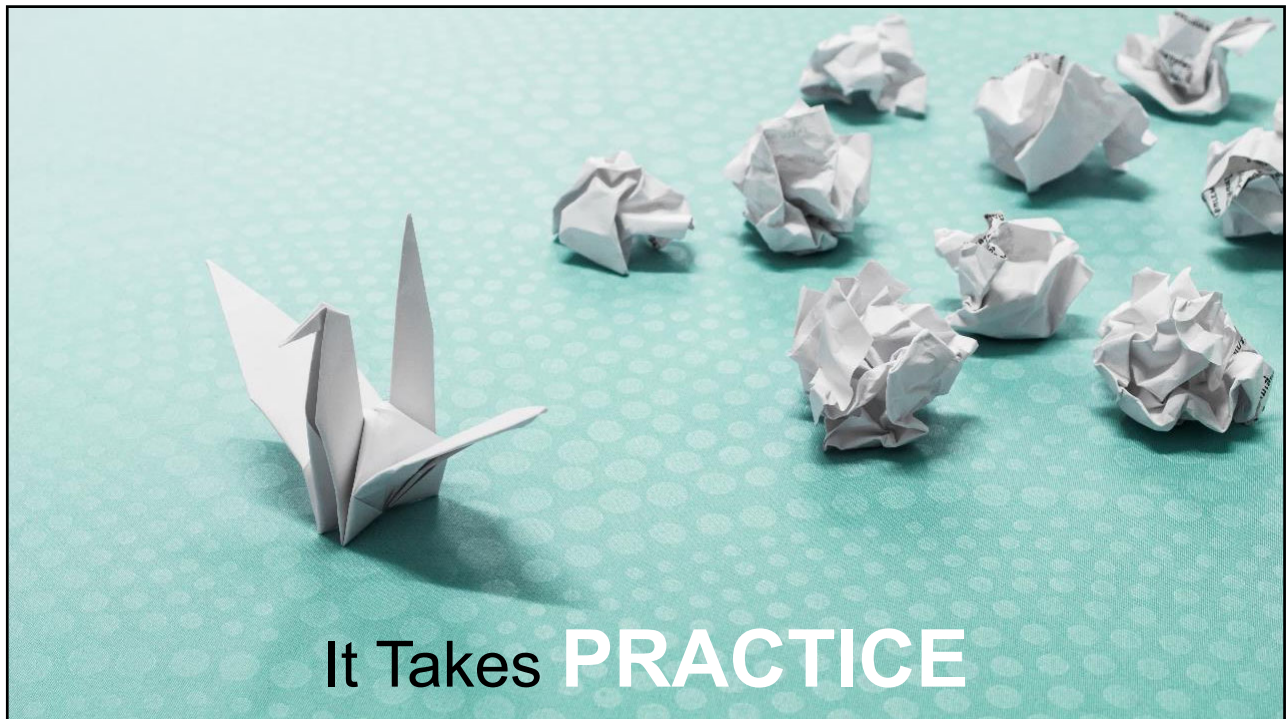


**Level 3:** A decision that cannot be made without input from the leader

**Level 2:** A decision that a direct report makes on their own and tells the leader about, along with rationale as to why they made the decision

**Level 1:** A decision that a direct report makes and does not need to tell their leader about

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It Takes **PRACTICE**

## Filters

Use filters and questions to help evaluate your success:

- How did I develop my team today?
- How did my actions align with our strategic direction?
- Where did I move our strategy forward?
- What did I explore about the environment and how did I connect it to our strategy?
- What steps did I take to develop myself and continue my professional development?

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## Tips & Tricks

- Reframe your personal measure of success using different filters
- Identify 10 things you can stop doing or delegate
- Structure your time, use your tools, and assess regularly
- Provide more feedback and include observations
- Implement 3 Levels of Decisions

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# Wrap Up

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# Thank You!

Scan the QR code to access bonus resources, recommended tools, and additional perspectives to help you apply today's insights in real-world HR settings.

