# ORGANIZATIONAL LEARNING & DEVELOPMENT

## Department Charter, FY27

Learning & Development opens organization-wide on October 28. This proposal seeks to position this initiative as a new  People & Culture  function with structure and clarity.

PRESENTED BY

**Organizational Development for internal planning with Human Resources**



FRAMEWORK & OVERVIEW

# Building the L&D Function

**01** **Step 1: Define the Vision and Goals**

Philosophy, strategy, priorities, and measures

**02** **Step 2: Design the Structure and Processes**

Placement, policies, decision-rights

**03** **Step 3: Build the Right Team**

Roles and skills

**04** **Step 4: Measure and Improve**

Evaluation, feedback, and reporting

**05** **Roadmap and Investment**

Job architecture, the plan to March, and decisions

**The Goal:** Reach consensus on strategy, process, and policies before the LMS opens on October 28.

STEP 1

# DEFINE THE VISION AND GOALS



STEP 1 · VISION AND GOALS (DISCUSSION)

# Defining Our Learning Philosophy Together

A philosophy holds when the people it serves help write it. These grounding questions open a working session with SMT, HR, and Culture Champions, and L&D drafts the statement from their answers.

1. **Why does learning matter to our mission and strategic plan?**
2. **Who is learning for, and what can every Team Member count on?**
3. **What do we believe about how people at the organization learn best?**
4. **How do Team Members, managers, and the organization share learning responsibility?**
5. **What will we invest in first, and what will we choose not to do?**
6. **How will we know our learning is making a difference?**

STEP 1 · PROPOSED VISION AND GOALS

# Vision and Mission

## VISION

**A learning organization where every Team Member grows in their role, sees a path forward, and helps the organization deliver its strategic plan.**

## MISSION

Learning & Development builds the knowledge, skills, and leadership the organization needs to deliver its strategic plan, through learning that is open to everyone, relevant to each role, and connected to the culture we are building together.

## HOW L&D ADVANCES THE STRATEGIC PLAN

1
**Advance Operational Excellence**
Shared standards, documented processes, capable managers

2
**Strengthen Investments**
Fundraising and stewardship skills for Development

3
**Catalyze Student Success**
Program and scholarship teams ready to serve students

4
**Expand Innovation**
Digital, data, and AI skills for new ways of working

5
**Narrate Our Story**
Brand awareness, communication and storytelling skills across teams

6
**Deepen Community Impact**
Partnership and community engagement skills

STEP 1 · VISION AND GOALS

# Three-Year Strategy

## YEAR ONE · FY27 — Self-paced learning

We are here

*Team Members direct their own learning*

- 360Learning, Humentum, eCornell
- Required HR policies training
- 360 Assessment and Active Manager cohorts
- Core Values eLearning and Cultural Immersion

**KPI**

**100% of Team Members active in the LMS and current on required training**

## YEAR TWO · FY28 — Role-specific development

*Learning built around each role*

- Department onboarding curricula
- Career ladders, job architecture
- Performance-based learning
- Full compliance training

**KPI**

**100% of departments have an onboarding path and a visible route to advance**

## YEAR THREE · FY29 — Personalized journeys

*Learning built around each person*

- Continuing education support
- Learning through partnerships
- Mentoring and peer learning
- Individual development plans

**KPI**

**100% of Team Members own a development plan and the path to reach it**

FY28 and FY29 milestones are proposed targets, confirmed as needs analysis and job architecture progress.

STEP 1 · VISION AND GOALS

# FY27 Priorities

| # | Priority | Outcome | Lead | Key milestone |
|---|---|---|---|---|
| 1 | Prepare the Platform | A secure, fully populated LMS reached from the Hub | OD | Key Approvals Oct 23 |
| 2 | Launch | LMS opens organization-wide with a reason to log in | OD | Launch Oct 28 |
| 3 | Training Cadence | Required training on schedule | OD/ HR/LD | For Discussion |
| 4 | Culture and Core Values | Core values embedded through Core Values eLearning, Immersion, Café Hours | OD | For Discussion |
| 5 | Manager Training | Manager cohorts launched by the 360 assessment, plus nine modules | OD/ HR/LD | For Discussion |
| 6 | Department and Job Training | Department onboarding and growth tied to job architecture | LD | For Discussion |
| 7 | Annual Conference | May conference designed as a learning event | OD/HR/LD | Decision by |

Every priority has a full task list in the L&D Business Plan FY27, with an owner and the people consulted and informed for each of its 190 tasks.

STEP 1 · VISION AND GOALS

# FY27 Measures of Success

| Measure | What it tracks | FY27 target | Cadence |
|---|---|---|---|
| LMS activation | Team Members who log in and enroll | 100% active | Weekly-Achieved by 3/31 |
| Required training | HR Policies completion by the due date | 100% current | Weekly - Achieved by 3/31 |
| Week one adoption | Logins from Oct 28 to Nov 6 | Baseline at launch | Once, Nov 6 |
| Learner satisfaction | Post-course survey rating | TBD | Monthly |
| 360 assessment participation | Raters completing within 10 business days | TBD | During window |
| Manager cohort progress | Cohort 1 completes Sessions 1 to 3 | TBD | Per session |

Discussion: What other KPIs should be included?

STEP 1 ·PROPOSED VISION AND GOALS

# Learning Is a Shared Responsibility

| | | | |
|---|---|---|---|
| **Team Members** | Own your development goals | Complete required training | Apply learning on the job |
| **Managers** | Discuss learning in 1:1s | Protect time for learning | Approve and support requests |
| **Learning & Development** | Run the LMS and catalog | Design and deliver training | Track requests and impact |
| **Organizational Development** | Lead culture transformation | Build team effectiveness | Leadership development |
| **Human Resources** | Own policies and develop talent | People analytics & HRIS | Lead job architecture |
| **Senior Leaders** | Sponsor and fund learning | Go first in assessments | Remove barriers to learning |

**Are there any other stakeholders we need to map?**

STEP 2

# DESIGN THE STRUCTURE AND PROCESSES



STEP 2 · STRUCTURE (DISCUSSION)

# Why Role Clarity Matters Now

## 01

### Internal Capacity

L&D is launching inside OD: a one-person team.

## 02

### Shared borders with HR

Policies training, the 360 assessment, department onboarding, HRIS data, and career pathways each touch both HR, OD, and L&D.

## 03

### Job architecture is underway

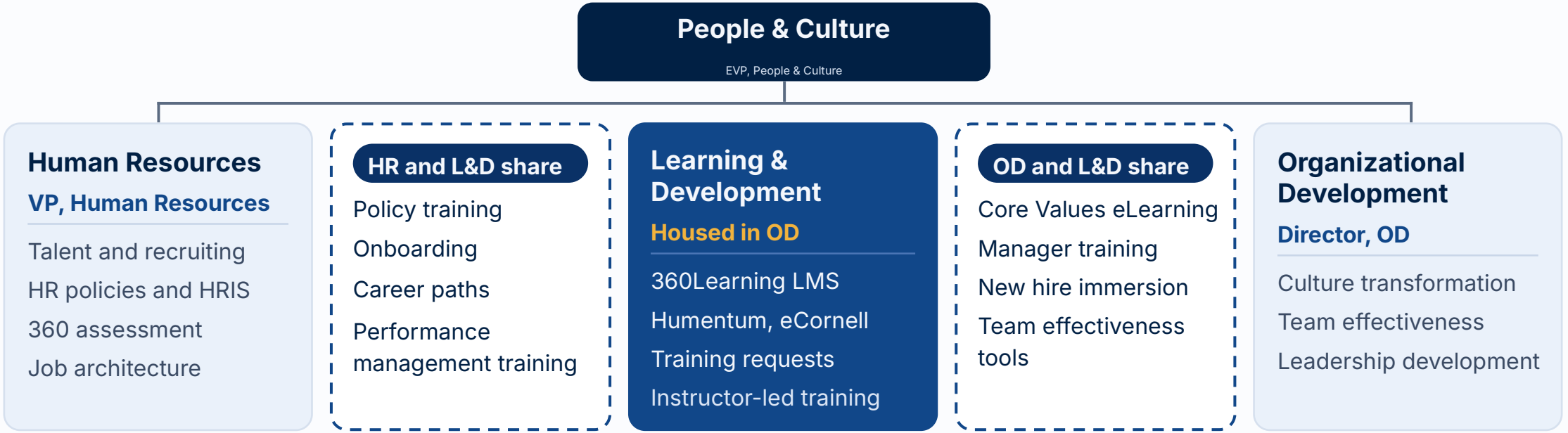
HR is defining job families, levels, and pathways now. Learning paths will be built on that framework.

**Discussion Questions:**

- Where does L&D sit?
- Who decides?
- Who builds?
- How does work come in?

STEP 2 · STRUCTURE

# Current Structure




Active Manager cohorts launched by the 360 assessment · Department training aligned to job architecture

STEP 2 · STRUCTURE

# Where L&D Could Sit

OPTION A

## Within HR

**Strengths**

Close to policy, HRIS data, and the performance cycle.

**Risks**

For discussion

OPTION B

## Within OD

**Strengths**

Tied to culture, leadership, and change, and already building the launch.

**Risks**

For discussion

Proposed

OPTION C

## Standalone function

**Strengths**

Clear identity, with its own budget and headcount.

**Risks**

For discussion

Current

OPTION D

## OD-led, HR collaboration

**Strengths**

Allows for strategic cross collaboration

**Risks**

OD Capacity; Success depends on clear timelines, priorities, and decision rights.

WORKSHEET · YOUR INPUT · 1 OF 3

# RACI Worksheet: Planning and Requests

| Task | L&D | OD | HR | Leaders and Managers | ET | Other Departments | Executive Sponsor |
|---|---|---|---|---|---|---|---|
| Set the annual L&D strategy and plan | | | | | | | |
| Build the annual L&D budget | | | | | | | |
| Approve the annual L&D budget | | | | | | | |
| Review quarterly learning spend reports | | | | | | | |
| Administer LMS groups and enrollments | | | | | | | |
| Add new hires and remove departures | | | | | | | |
| Maintain SSO, security, and integrations | | | | | | | |
| Receive and log training requests | | | | | | | |
| Run needs analysis on each request | | | | | | | |
| Prioritize requests against capacity | | | | | | | |
| Track requests and report status to SMT | | | | | | | |

Enter R, A, C, or I in each cell. Each task gets exactly one A. Note any task you would add or split.

R Responsible · A Accountable · C Consulted · I Informed · Other Departments = write in

WORKSHEET · YOUR INPUT · 2 OF 3

# RACI Worksheet: Content and Delivery

| Task | L&D | OD | HR | Leaders and Managers | ET | Other Departments | Executive Sponsor |
|---|---|---|---|---|---|---|---|
| Provide subject matter content | | | | | | | |
| Design and build eLearning courses | | | | | | | |
| Design live and experiential training | | | | | | | |
| Create job aids and quick guides | | | | | | | |
| Review content for accuracy | | | | | | | |
| Approve new content before launch | | | | | | | |
| Approve compliance and policy training | | | | | | | |
| Source and purchase library courses | | | | | | | |
| Publish and announce new courses | | | | | | | |
| Assign required training and due dates | | | | | | | |
| Follow up on overdue required training | | | | | | | |

Enter R, A, C, or I in each cell. Each task gets exactly one A. Note any task you would add or split.

R Responsible · A Accountable · C Consulted · I Informed · Other Departments = write in

WORKSHEET · YOUR INPUT · 3 OF 3

# RACI Worksheet: Programs and Pathways

| Task | L&D | OD | HR | Leaders and Managers | ET | Other Departments | Executive Sponsor |
|---|---|---|---|---|---|---|---|
| Facilitate manager training cohorts | | | | | | | |
| Administer the 360 assessment assessment | | | | | | | |
| Facilitate New Hire Cultural Immersion | | | | | | | |
| Approve eCornell requests | | | | | | | |
| Process Organization-funded tuition payments | | | | | | | |
| Approve external training requests | | | | | | | |
| Identify department training needs | | | | | | | |
| Set the department training roadmap | | | | | | | |
| Define job families and levels | | | | | | | |
| Map learning paths to job levels | | | | | | | |
| Evaluate training effectiveness | | | | | | | |

Enter R, A, C, or I in each cell. Each task gets exactly one A. Note any task you would add or split.

R Responsible · A Accountable · C Consulted · I Informed · Other Departments = write in

STEP 2 · POLICIES (DISCUSSION)

# Rules of Engagement with L&D

| # | Proposed rule | What it means in practice |
|---|---|---|
| 1 | Needs analysis comes first | Every request starts with an action mapping conversation before anything is built. |
| 2 | Training is one option of several | Job aids, process fixes, or manager coaching may solve the need faster. |
| 3 | Request Process | All requests use the training request form, including HR and OD. |
| 4 | Leaders sponsor their training | Requesting leaders supply SMEs, review time, and sign off on scope. |
| 5 | Approve before launch | New content follows the approval path before it goes live in any format. |
| 6 | Required means tracked | Required training carries a due date, reminders, and an escalation path. |
| 7 | Capacity sets timing | Requests outside the roadmap are scored and scheduled against capacity. |
| 8 | Costs travel with the request | Specialized filming, tools, or licenses for one department use its budget. |
| 9 | Accessible and on brand | Captions, transcripts, and brand standards on everything L&D releases. |
| 10 | Records are kept | Completions are retained for audits; 360 Assessment results stay private. |

STEP 2 · POLICIES TO DECIDE TOGETHER · 1 OF 3 (DISCUSSION)

# Policy Questions: Requests and Training

| Topic | Question to decide | Proposed starting point |
|---|---|---|
| Requests between roadmaps | How are requests handled when they arise between the roadmap and HR's planned trainings? | Same intake and scoring; compliance and legal needs move first; others join the next quarter. |
| External training | How are outside workshops, conferences, and certificates requested and approved? | Manager approves; L&D logs it and checks for an internal option; learning is shared back. |
| Department training costs | Who pays for filming, specialized tools, or licenses for department training? | The requesting department, from a cost estimate approved before the build begins. |
| Required versus optional | Who can make training required, and for which audiences? | HR and the Sponsor set organization-wide requirements; leaders may require role training. |
| Time to learn | How much work time can Team Members use for learning each quarter? | [__] hours per quarter, scheduled with the manager. |
| Content upkeep | Who keeps department content current, and how often is it reviewed? | The owning department's SME, with a yearly review alongside L&D. |
| Internal trainers | Who can teach, and how are SME facilitators prepared and recognized? | SMEs complete facilitator prep with L&D; contributions are noted in their goals. |

Starting points are proposals for discussion. Bracketed values are set together.

STEP 2 · POLICIES TO DECIDE TOGETHER · 2 OF 3 (DISCUSSION)

# Policy Questions: Funding and Reporting

| Topic | Question to decide | Proposed starting point |
|---|---|---|
| eCornell with organization funds | What are the eligibility rules, annual cap, and approval steps? | 90 days of service, good standing, and manager approval; cap of [$__] per Team Member. |
| eCornell with personal funds | What is the process when a Team Member pays their own way? | Same request form for the record and manager awareness; completion logged in the LMS. |
| Leaving after funding | Is Organization-funded tuition repaid if a Team Member leaves soon after completing it? | Options: no repayment, or prorated repayment within [__] months. Decide with HR and Legal. |
| Quarterly spend reports | Where do the quarterly eCornell and Humentum expense reports go, and who acts on them? | L&D owns them, reviews them with the Executive Sponsor, and shares them with Finance. |
| L&D budget | Who owns the L&D budget, and what is the FY27 amount? | L&D manages it within People & Culture; [$__] approved by the Sponsor. |
| Vendors and tools | Who approves new learning vendors, content libraries, or AI tools? | L&D recommends, ET reviews security, and the Sponsor and Finance approve spend. |
| Training records | Who can see individual training records and results? | Team Members see their own, managers see their teams, and 360 Assessment results stay private. |

Starting points are proposals for discussion.

STEP 2 · POLICIES TO DECIDE TOGETHER · 3 OF 3 (DISCUSSION)

# Policy Questions: Communication and Cadence

| Topic | Question to decide | Proposed starting point |
|---|---|---|
| New course announcements | How and where are new courses announced to Team Members? | A monthly "New in 360Learning" note, plus the Team Check In and the Team Member Hub. |
| Catalog refresh | How often do new courses arrive in the LMS? | A quarterly refresh, timed with the catalog usage review. |
| Experiential learning | How often are live practice sessions offered, and how is time protected? | Quarterly at minimum; managers release time for Team Members to attend. |
| Learning in goals | Does learning count in goals and performance reviews? | Each Team Member sets at least one development goal, discussed at mid-year. |
| Accessibility | How do we meet accessibility and accommodation needs? | Captions and transcripts by default; accommodations requested through HR. |
| Contractors and temps | Do non-employees get LMS access, and to which courses? | Required training only, as set by HR. |
| Feedback on L&D | How do Team Members suggest courses or give feedback on L&D? | Course surveys plus an open suggestion link on the Team Member Hub. |

Starting points are proposals for discussion. Bracketed values are set together.

STEP 2 · PROCESS

# Training Request Process

**1**

### Submit

Requester completes the training request form on the Team Member Hub.

**Any Team Member or leader**

**2**

### Triage and score

Scores the request on five weighted criteria.

**Respond within 5 business days**

**3**

### Decide

Use an existing course, build, partner, schedule later, or decline with a reason.

**4**

### Build and launch

Follows the program design and delivery process, then is assigned delivered in the agreed upon manner.

**5**

### Evaluate

Survey, completions, and a 30 and 90 day check, shared back with the requester.

**Possible decisions** Existing training | Build new | Partner or purchase | Schedule later | Decline with reason

STEP 2 · MOCKUP

# Prioritization Scorecard

*Illustrative example: a department onboarding refresher. Scores run from 1 to 5.*

| Criterion | Weight | Score | Weighted |
|---|---|---|---|
| Alignment with strategy and core values | 25% | 4 | 1.00 |
| Business impact | 25% | 4 | 1.00 |
| Audience size and criticality | 20% | 3 | 0.60 |
| Urgency or compliance requirement | 15% | 2 | 0.30 |
| Feasibility within current capacity | 15% | 3 | 0.45 |
| Total score | 100% | | 3.35 |

## Proposed decision rule

**3.5 and up** — Accept and schedule

**2.5 to 3.4** — Schedule later or redirect to the catalog

**Below 2.5** — Decline with rationale

### Example result: 3.35

Schedule for a later quarter, or redirect to an existing course if one meets the need.

Method adapted from Cognota, L&D Capacity Planning, 2026.

STEP 1 · VISION AND GOALS

# How Learning Is Delivered

## Self-paced eLearning

Humentum library, core values eLearning, goal setting, and HR policies in 360Learning.

**For all Team Members**

## Live experiential sessions

Live, instructor-led, training delivered at the organizational and team level.

**For all Team Members**

## Leadership cohorts

Manager cohorts launched by the 360 assessment. Offered continuous learning through the LMS, coaching, and instructor-led training

**For people managers**

## Continuing education

eCornell certificates and courses at discounted tuition.

**For eligible Team Members in good standing**

## Culture conversations

New Hire Cultural Immersion, Café Hours, and Solutions Labs.

**For new hires and all Team Members**

## Annual conference

Annual Conference

**For all Team Members**

LEARNING CALENDAR

# Annual Learning Rhythm

## Always on

Any time, any device

- 360Learning catalog
- eCornell programs
- Core Values eLearning

## Every quarter

Live and refreshed

- New Hire Cultural Immersion
- Café Hours
- Live experiential sessions
- Catalog refresh

## Every year

On the annual calendar

- Compliance/HR Policies training
- Goal setting
- 360 Leadership Assessment Debrief
- Annual Conference
- Effective feedback

## When you join

Assigned automatically

- Core values eLearning in 30 days
- HR Policies in 30 days
- Immersion in your first quarter

STEP 3

# BUILD THE RIGHT TEAM



STEP 3 · TEAM

# Roles the Strategy Requires

| Role | What it covers | Covered today by | FY27 and beyond |
|---|---|---|---|
| L&D leadership | Strategy, budget, stakeholders, timelines | OD/HR | |
| Instructional designer | Needs analysis, curricula, eLearning | OD | |
| LMS administrator | Groups, enrollment, catalog, reports | OD/HRIS | |
| Facilitator | Live sessions, cohorts, immersion | OD | |
| Producer and editor | Filming, AI video, captions | OD/External Videographer | |
| Graphic designer | Decks, job aids, LMS branding | OD | |
| Learning coordinator | Scheduling, communications, reminders | OD/HR (depends on who owns the training) | |
| Data and reporting | Dashboard, KPIs, monthly report | OD/HR (depends on who owns the training) | |

STEP 4

# MONITOR, EVALUATE, AND IMPROVE



STEP 4 · MEASURE AND IMPROVE

# Four Levels of Evaluation

LEVEL 1

## Reaction

*Did it land?*

A short survey after every course and live session.

**Every course**

LEVEL 2

## Learning

*Did people learn it?*

Knowledge checks in eLearning and policy acknowledgments.

**Every course**

LEVEL 3

## Behavior

*Is it used on the job?*

30 and 90 day application checks, 360 Assessment follow-up and retest, and manager observation.

**Quarterly**

LEVEL 4

## Results

*Did the organization change?*

OCA trends, retention, internal mobility, and compliance rates.

**Annually**

STEP 4 · MEASURE AND IMPROVE

# Feedback Loops and Reporting

### Learners

Post-course surveys on every course and quarterly feedback on live programs. When learners ask for more interaction, we add practice.

### Facilitators and designers

Learner feedback on each facilitator and course design guides coaching, peer review, and knowledge sharing.

### The L&D team

Regular 1:1s surface growth areas, and the team's own development is planned the same way we plan it for others.

## Reporting rhythm

**Nov 2 to 6**
Week one adoption shared

**Monthly, from Nov 30**
L&D dashboard - completion rates; eCornell requests

**Quarterly**
Strategy review, catalog refresh, and capacity check

**Annually**
Results against KPIs and next year's plan

**Who needs to be informed?**

# ROADMAP AND INVESTMENT



TENTATIVE ROADMAP · FY27 (DISCUSSION)

# Roadmap Through March

## Oct
Launch

- HR Policies shoot, TBD
- Pilot testing, Oct 22 to 23
- All approvals by Oct 23
- **LMS launch, Oct 28**

## Nov
Adopt

- Drop-in LMS workshops
- Feedback Surveys and dashboard live
- 360 scope decided, TBD
- NHCIE Planned

## Dec
Embed

- HR Policies assigned, Dec 9
- First Immersion, Dec 10
- Manager modules uploaded
- Core Values eLearning for recent hires

## Jan
Prepare

- 360 announced at Check In
- 360 opens, Jan 25
- Experiential session
  New courses sourced
- Finance, ET, Legal Compliance Training

## Feb
Develop

- 360 results to leaders
- Manager Session 1, Cohort 1
- Modules assigned to managers
- SME (dept) interviews begin

## Mar
Review

- Manager Sessions 2 and 3
- Immersion and Café Hours
- Program evaluation
- FY28 department planning

### Discussion: launch timing

Running alongside: HR mid-year reviews, Nov 16 to Dec 11, and the Job Architecture Initiative (engagement Oct to Nov, prototyping Dec to Jan, finalized Feb).

ROADMAP · FOR DISCUSSION

# Department Training Roadmap: Suggested

## WAVE 1 · FY28 Q1 TO Q2

### Development

**Why first**

Drives the strategic plan's fundraising and investment goals.

**First builds**

Development onboarding and fundraising skills by level.

## WAVE 2 · FY28 Q3

### Scholarships and Programs

**Why next**

Delivers Catalyze Student Success for students and member institutions.

**First builds**

Program onboarding; student and partner service skills.

## WAVE 3 · FY28 Q4 TO FY29

### Operations, including Administration

**Why then**

Advances Operational Excellence and builds on Finance, Legal, and ET policy training.

**First builds**

SOP-based job aids and onboarding paths for each team.

**Every wave** Interviews → Inventory → Onboarding path → Paths by level → Pilot → Launch

A suggested starting point. The sequence, timing, and first department are open for discussion.

WORKSHEET · YOUR INPUT

# Department Training Roadmap: Your Version

## WAVE 1

**Department**

**Timing**

**Why this department**

**First learning need**

**SME and leader partners**

## WAVE 2

**Department**

**Timing**

**Why this department**

**First learning need**

**SME and leader partners**

## WAVE 3

**Department**

**Timing**

**Why this department**

**First learning need**

**SME and leader partners**

Which need is most urgent? Where would early success build momentum?

Fill in your recommended sequence; we compare versions in the working session.

ROADMAP · JOB ARCHITECTURE

# How Job Architecture Becomes Learning Paths

**HR**

### Job family

*What kind of work is this?*

→

**HR**

### Level

*How broad is the role's scope?*

→

**HR**

### Advancement criteria

*What does it take to move up?*

→

**HR and L&D**

### Skills by level

*What must someone know and do?*

→

**L&D**

### Learning path

*How do they build it?*

## EVERY LEARNING PATH HAS THREE LAYERS

### Onboarding

The first 90 days in a role: tools, processes, and the people to know.

### Core skills

What it takes to perform well at this level of the family.

### Next-level readiness

Built directly from the advancement criteria for the next level.

Readiness shows up in completions, applied work, manager feedback, and for leaders, the 360 assessment.

ROADMAP · JOB ARCHITECTURE

# Job Architecture: Who Does What

| Phase | HR and its consultants | L&D partnership tasks |
|---|---|---|
| Oct to Nov | Group interviews with selected Team Members and an in-person framework design workshop. | Join workshop planning, share L&D's needs, and identify SMEs among participants. |
| Dec to Jan | Prototype job families and levels, and synthesize feedback from the interviews and workshop. | Review draft levels for skills language; inventory department training; draft the SME guide. |
| Feb | Finalize the framework: job families, levels, progression pathways, and advancement criteria. | Translate advancement criteria into skills by level; interview SMEs and leaders through March. |
| FY28 | Launch and implement: place roles in the framework and communicate pathways to Team Members. | Build development paths by level, tag LMS courses, and publish ladders in Q3. |

**L&D NEEDS FROM HR** Participant lists, draft families and levels, the advancement criteria, and the launch timeline, shared as each phase closes.

INVESTMENT

# FY27 Investment

| Category | What it covers | FY27 amount | Status |
|---|---|---|---|
| Learning platform | 360Learning LMS license | [$__] per year | Paid |
| Course library | Humentum Learning Services catalog | [$__] per year | Purchase pending |
| Continuing education | eCornell programs at discounted tuition | [$__] | TBD |
| Production tools | HeyGen, Articulate, and Canva | [$__] | TBD |
| Engagement | 360 Assessment campaign: gift cards and team lunch | [$__] | TBD |
| External Partners | Videographer, Guest Speakers, Consultants | [$__] | TBD |
| Instructional design | L&D Specialist position | Position budget | In recruitment |
| FY28 conference | Venue, hotel block, AV, and travel | [$__] | TBD |
| FY27 total | | [$__] | |