

Plus4 Credit Union Job Description

Position: **Operations Trainer**
Reports To: **Marketing and Training Manager**
FLSA: **Non Exempt**

Summary

To improve overall employee effectiveness/performance through the application of individual and group training techniques and programs, consistent with the Credit Union's organizational priorities.

Essential Duties

- Responsible for NEO program training, including use of computers and software.
- Formulates training outline and determines instructional methods, utilizing individual training, group instructions, demonstrations, and workshops; selects or develops training aids such as handbooks, visual aids, and tutorials.
- Evaluates and assists in designing training manuals and related materials, training classes, and training procedures.
- Tracks the progress of trainees through routine tests, observation, and feedback from supervisors; evaluates the effectiveness of the current training.
- Completes required reports and documents; attends meetings as required.
- Maintains Learning Management System, BVS, and submit curriculums to Senior Management for approval. Also, register all new employees, reset passwords and assign courses to employees.
- Carries out assigned responsibilities according to established department standards.
- Meets all training objectives and goals established for the year.
- Maintains a basic understanding of Credit Union products, services, policies and procedures, as well an understanding of the Credit Union's mission.
- Completes reports and records accurately and in a timely manner.
- Relates any problems in training effectiveness to the supervisor, making recommendations to resolve them.
- Provides informed, professional and accurate service and support to all members and associates.
- Create productivity reports to manager.
- Performs other duties as assigned.

Role:

Employee shall demonstrate an understanding of and follow the requirements of all regulation compliance including but not limited to those Bank Secrecy Act (BSA), Anti-Money Laundering (AML), Office of Foreign Assets Control (OFAC), Customer Identification Program (CIP) and Member Due Diligence (MDD) as it specifically relates to their job functions. Employee shall be trained annually in BSA/AML compliance.

Qualifications

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Communications – Must have excellent written and verbal communication skills and the ability to speak and write clearly and effectively to achieve the desired effect in a variety of communications settings and styles. The ability to prepare and maintain confidential records and reports.
- Member Focus – the dedication to meeting the expectations and requirements of internal and external members, use feedback for continuous improvement, and develop and maintain effective relationships.
- Time Management – the ability to effectively prioritize tasks to use time efficiently and attend to a broad range of activities.
- Creativity – the ability to generate new and unique ideas as solutions to operational or member service issues, and develop non-traditional ways of doing business.
- Interpersonal Skills – A significant level of trust and diplomacy is required, in addition to normal courtesy and tact. Work involves extensive personal contact with others and/or is usually of a personal or sensitive nature. Work may involve motivating or influencing others. Outside contacts become important and fostering sound relationships with other entities (companies and/or individuals) becomes necessary.
- Must be able to operate related computer software and business equipment including 10-key, telephone, slide, film, overhead projector, and other related training aids.
- Must be proficient in Microsoft Office products, including but not limited to Word, Excel, email and Outlook.

Education/Experience

- A college degree or the equivalent in two to five years of related Credit Union or Financial experience.

Physical/Mental 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.

- While performing the duties of the job, the employee is regularly required to stand, sit, walk, use hands to finger, handle, or feel, reach with hands and arms, stoop, kneel, crouch or crawl, and talk or hear.
- The vision requirements include: close vision and ability to adjust focus.
- Nature of position requires physical mobility and the ability to lift a minimum of 50 pounds.
- Must have flexibility to deal with changing work hours and locations as needed.

By signing below, employee agrees they are able to perform the essential duties listed within this document, as well as any additional duties assigned by their supervisor. The

employee also agrees to actively seek out the information and training needed to perform these duties to the best of their ability.

This Job Description is not a complete statement of all duties and responsibilities comprising this position.

I have read and understand the duties, expectations, and qualifications detailed above for the Trainer job role.

Signed:

Employee Signature

Date _____

Print Employee's Name