Training & Development Specialist
City & County Credit Union

Classification: Non-Exempt
Reports to: Training & Development Manager
Review Date: January, 2024

JOB DESCRIPTION

The Training & Development Specialist works alongside members of the Training Team to assist in coordinating and administering credit union educational programs that align with organizational objectives and goals. This position ensures that team members are efficiently and effectively trained in their job responsibilities utilizing a variety of training delivery methods.

Essential Functions:

- Presents department and job specific learning content via one or more of the following platforms: on-the-job training, job simulations, e-learning, instructor-led workshops, virtual, or a blended solution to individuals or groups in an engaging and effective manner.
- Facilitates monthly new employee orientation, acting as an ongoing mentor to new employees to help them feel welcomed and supported as they become acclimated to CCCU, their new department and position.
- Prepares the training room for training sessions; setting up audiovisual equipment and printing and distributing training materials.
- Acts as a mentor and resource to employees by answering questions and assisting with issues.
- Ensures consistency in our sales and service delivery by identifying and recommending alignment of, training to and encouraging usage of our policies and procedures.
- Works with employees to convey and clarify new policies and procedure changes.
- Reports on employee progress during training to their manager and the Training & Development Manager. Identifying strengths and opportunities, recommending solutions to support employee success in learning their role.
- Conducts observation coaching of Member Experience staff sales and service encounters and position responsibilities to assess training needs and provide feedback.
- Analyzes feedback and learning impact from participants and managers of provided training, making recommendations for change to improve curriculum or content to increase value to learners if needed.
- Adjusts training delivery based on the learning style of individual employees.
- Keeps current with training trends by attending outside training and training related networking events, and assesses employee-training needs to make recommendations for improvements as needed.
- Builds and maintains positive, collaborative relationships with managers and employees across the organization, while assisting with our cultural, community and employee engagement focus and initiatives.
- Follows Bank Secrecy Act (BSA) policies and procedures as they relate to this position.
- Other responsibilities as assigned by the Training & Development Manager, VP Human Resources or President.

Competencies & Skills:

- Displays professional image, shows respect and patience while building an engaging work environment for all employees keeping CCCU Service Standards in mind.
- Must be able to train employees efficiently and effectively via various training methods, such as classroom, virtual and one-on-one.
- Must be able to adapt to a variety of adult learning styles.
- Communicates effectively and professionally with tact and diplomacy, with strong oral and written communication skills
- Exhibits a strong knowledge of all CCCU convenience, deposit and lending products.
- Promotes and demonstrates excellent member sales and service skills and a solid understanding of Credit Union regulations, policies and procedures.

- Demonstrates an exceptional work ethic, attitude, and the ability to remain positive and give objective criticism.
- Capable of working independently, with little supervision.
- Able to discern priorities and balance workload based on competing demands.
- Demonstrates high attention to detail, accuracy and thoroughness.
- Flexible and adaptable to changing job requirements.

Qualifications:

- High School Diploma or equivalent required, Associates or Bachelor's degree preferred.
- 2+ years' prior credit union or financial institution experience preferred.
- 2 years of facilitating training or leadership in a financial institution preferred.
- Proven competence in interpreting comprehensive concepts and the ability to break those complex issues into an understandable teaching format.
- Proficient in Word, PowerPoint, and Excel with a willingness to learn and master other software programs.

Supervisory Responsibility: This job has no supervisory responsibilities.

Work Environment: This job operates in a professional office environment. This role routinely uses standard office equipment such as computers and phones.

Physical Demands:

Occasional walking, sitting and standing. Occasional lifting up to 25 pounds. Occasional bending and/or reaching for supplies on ground level. Occasional reaching above shoulder level for supplies overhead. Frequent repetitive use of hands such as simple grasping, twisting/turning of wrists, and finger dexterity to perform various accounting duties such as using a 10 key calculator, keyboarding and entering data into the computer system. Frequent speaking, listen and hearing for interaction with members, staff, and the general public. Occasional clarity of vision at 20 inches or less. Frequent clarity of vision at 20 feet or more.

Position Type/Expected Hours of Work: Longer hours, evenings and weekend work may be necessary.

Travel: This position requires up to 60% travel.

Other Duties:

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities and activities may change at any time with or without notice.