



COMMUNITY CREDIT UNION
Position Description
Trainer

Reports to: AVP Human Resources
Department: Organizational Development

Grade: 9
Job Group: Non-exempt

The primary function of this position is to assist Community Credit Union of Florida in living out our Mission, “*Always improve the financial well-being of our members and make a positive difference in our community.*” The Trainer is responsible for organizing and conducting credit union training programs for all staff and to serve the training needs of the credit union. The individual is responsible for communicating the credit union mission, vision and philosophy to new staff members. He/she cultivates employees’ professional growth and improves overall employee effectiveness/performance through the application of dynamic and learner-centric training techniques. The Trainer ensures that ongoing programs reflect the strategic priorities of the credit union.

ESSENTIAL DUTIES

1. Deliver service to both internal and external members, which is in alignment with the credit union’s Service Promises.
2. Meets all established service goals as measured by the Internal Service Survey.
3. Performing job duties within our bylaws, regulations, Board of Directors policies, established internal and external service standards and our work procedures.
4. Demonstrate enthusiastic support of corporate mission, core values and long term objectives.
5. Assists in attaining established departmental goals and adhering to all credit union standard operating policies and procedures, as well as state and federal regulations and guidelines. Responsible for accurately completing job jar activities and entering data in timely manner to ensure 70-80% engagement metric is met.
6. Abides by CCU’s Service Promises when helping a member or co-worker to ensure timely responsiveness to the individual’s needs. Promotes teamwork, respects opinions, abilities and contributions of others and conveys a willingness to assist and cooperate with others for the benefit of the organization.
7. Administer the credit union’s training programs by creating and/or coordinating presentations and presenting programs, and conducting training activities. Schedules training sessions ensuring facility setup, audiovisual setup, and contacts attendees and department managers regarding training schedules.
8. Prepares training and resource manuals as defined by training needs and purpose. Assembles and composes information for the manuals. Creates training activities that result in interactive participation from staff. Selects and/or develops teaching aids such as training handbooks, demonstration models, multimedia visual aids, computer tutorials, and reference works.
9. Conducts new hire orientation training sessions for new employees, and focused job specific training in teller, member service, loan, operations, and other areas of the credit union as needed, including ServiStar sales and service training. branch operations/experience, risk management, compliance, and products and procedures.

10. Test trainees to measure progress and to evaluate effectiveness of training. Reports on progress of employees during training periods. Evaluates and measures the effectiveness of the programs through testing and course evaluations.
 11. Responsible for scheduling and tracking learning management systems training. Responsible for updating employee training records as needed; tracks attendance at various training sessions. Prepares reports on courses completed and delivers other training related communication.
 12. Investigates and researches available training methods and procedures to determine if new or improved training methods and materials could benefit the training program. Champion's on-going refinement of curricula, design and facilitation procedures to improve training experience quality.
 13. Supports instructional design with facilitation tools and training modules. Assists to evaluate and identify opportunities and methods to enhance e-learning and learning management systems programs and processes, and staying abreast of the new trends and tools.
 14. Provides individualized department training within the branches as needed. Provides in-branch/department training support when not facilitating or supporting training programs.
 15. Ensure all training materials, including procedures, job aids, manuals, eLearning courses, and training resources, etc. are current and up to date, and updated information is available in credit union intranet.
 - 11) Maintains on-going communication with supervisor, informing individual of all pertinent problems, irregularities, new developments, changes and other important information within the department.
 16. Follows policy and procedures related to Bank Secrecy Act (BSA), Anti-Money Laundering (AML), Customer Identification Program (CIP) and Customer Due Diligence (CDD) daily to ensure compliance with current regulations.
 17. All other duties as assigned.
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ENVIRONMENT AND PHYSICAL ACTIVITY

The environment for this position is an open office that is clean and comfortable and includes driving a vehicle approximately 10% of the time. The incumbent is in a non-confined office-type setting in which he/she is free to move about at will.

The incumbent in the course of performing this position spends time writing, typing, speaking, listening, lifting (up to 25 pounds), carrying, seeing (such as close, color and peripheral vision, depth perception and adjusted focus), sitting, pulling, walking, standing, squatting, kneeling and reaching.

The incumbent for this position may operate any or all of the following: telephone, cellular telephone, beeper, copy and fax machines, calculator, personal computer and related printers.

MENTAL DEMANDS

The incumbent in this position must be able to read and interpret documents or instruments; perform highly detailed work; perform mathematical functions, conduct meetings and presentations, prepare written

communication, perform analytical reasoning, withstand stress, handle multiple, concurrent tasks and constant interruptions.

POSITION REQUIREMENTS

These specifications are general guidelines based on the minimum experience normally considered essential to the satisfactory performance of this position. The requirements listed below are representative of the knowledge, skill, and/or ability required to perform the position in a satisfactory manner. Individual abilities may result in some deviation from these guidelines.

- Two-year college degree from a college or university; or three (3) or more years of related experience and/or training; or the equivalent combination of education and experience. Work related experience must consist of broad-based financial institution experience, prior training, teaching or related experience.
- Exceptional oral, written and interpersonal communication skills with the ability to effectively listen, take instruction and disseminate information. Knowledge of the structure and content of the English language including the meaning and spelling of words, rules, composition and grammar.
- Ability to develop visual graphics, design curriculum, develop and proof written materials and speak at ease to varied size groups. Must demonstrate the ability to interpret documents, understand procedures, write reports, procedures and correspondence with proficiency, and speak clearly to members and employees.
- Ability to learn and utilize various forms of training systems, software, and resources, including credit union intranet, learning management systems, content authoring tools, video editing software, and other training related resources.
- Strong process orientation: Detail oriented, logical, and methodological approach to program training processes. Ability to read, analyze and interpret general business periodicals, professional journals, and technical procedures. Ability to deal with complex problems involving multiple facets and variables in non-standardized situations.
- Proven ability to demonstrate patience, diplomacy, tact and professionalism and maintain confidentiality regarding issues of a sensitive nature.
- Excellent organization and time management skills and proven presentation and facilitation skills. Demonstrated ability to work independently and collaboratively, handle multiple priorities, problem-solve, exercise good judgement and employ initiative.
- Proficient knowledge of Microsoft Office tools: Word, Excel, PowerPoint, etc.
- Has a thorough knowledge of the credit union's products and services.
- Maintain a professional image of the Credit Union in dealing with members and team members.
- Current Florida driver's license and a vehicle with appropriate insurance coverage if required to drive in the course of performing assigned duties and responsibilities.

The incumbent must be able to perform this position safely, without endangering the health or safety to himself or herself or others.

Management reserves the right to change this position description at any time according to business needs.

Review and Approval: Indicates review by incumbent and approval by supervisor.

Employee: _____

Date: _____

Supervisor: _____

Date: _____

Human Resources: _____

Date: _____