

JOB DESCRIPTION



POSITION: Learning & Development Specialist

REPORTS TO: VP Human Resource Operations

SUPERVISES: None

JOB SUMMARY

To design, develop and deliver training and development opportunities that align with Columbia Credit Union's strategic plans, purpose, and values. This includes onboarding and job-specific task training that equips employees to succeed in their roles, while also offering development opportunities that strengthen professional capabilities and support career growth. Ability to produce and utilize analytics to evaluate course completions rates as well as review outcomes of attendees including retention, promotion and even particular leadership career paths. These are hands-on training and facilitating positions and must have excellent presentation skills in person and online. Proficient in creating instructional design to meet learner needs.

ORGANIZATIONAL COMPETENCIES

- **Builds Trust**
Demonstrate an uncompromising standard of ethical conduct and integrity to include trust and respect for each other, our members, and our communities.
- **Communicates Effectively**
Have a passion for helping members and staff achieve their goals by educating, offering tools and assistance in response to the members' needs in a way that the member can fully understand.
- **Teamwork and Cooperation (within & across units)**
Respect each person's ability to create and contribute toward the goal of delivering quality member service and innovative products, individually or as part of a team, through open communication and mutual trust.

JOB SPECIFIC COMPETENCIES

- **Achieves Results**
Prioritize achieving results, handle multiple projects, and ensure follow-through.
- **Continuous Learning and Development**
Take initiative in learning, seek feedback, and encourage skill development.
- **Creativity and Innovation**
Inject originality into work and encourage new ideas.
- **Dependability and Reliability**
Consistently show up for work, meet commitments, and perform job tasks reliably.
- **Flexibility & Adaptability to Change**
Adapt to change, maintain work effectiveness in new situations, and prioritize flexibility.
- **Positive and Professional Approach**
Create a positive work climate and support the organization's mission.
- **Understands Others' Perspectives**



Demonstrate empathy and consider multiple viewpoints.

ESSENTIAL DUTIES

- Develop and/or coordinate, conduct, and evaluate training in assigned areas: New Employee Orientation, Transactions, New Accounts, Loans, refresher training, reinforce learning, and teach new products and services
- Develop training material including, but not limited to classroom PowerPoints, self-directed digital training, process and product training and launches, participant and facilitator materials.
- Demonstrate the ability to both identify and interpret curriculum and training needs and create engaging instructional designs to meet the needs of diverse learners. including, but not limited to; instructor led or digital self-directed training; podcasts, videos, quizzes and surveys
- Ability to learn and competently facilitate all standard required training, as needed
- Skilled at generating interest and engagement with people along with classroom management skills
- Remain current on all policies and procedures to ensure training materials in assigned areas are up to date and in compliance
- Analyze the cost/benefit of outsourcing training and make appropriate recommendations. Recommend outside sources for development or purchase of training programs and materials.
- Assist in assessing training and development needs of the organization and recommending innovative solutions
- Continually optimize all software and systems used in the Learning & Development department.
- Run Reporting as requested to support leader and learner needs.
- Utilizing survey feedback and data analytics, consistently review effectiveness of programs. using KPI's: Retention, Promotion, and Return on Investment
- Administer and maintain Learning Management System/Training Databases
- Coordinate room reservations, set-up, AV equipment, supplies and materials as needed for internal and external trainers

JOB REQUIREMENTS

- Minimum five (5) years' financial institution job experience
- Minimum two (2) years' experience training/coaching adult learners
- Experience with Learning Management Systems, preferred
- Proficient in Microsoft Word, Power Point, Excel, and Internet use
- Excellent written and verbal communication skills

PHYSICAL REQUIREMENTS

The physical requirements outlined below encompass the diverse range of abilities needed for individuals to effectively perform the essential functions of this job.

- Communicate information and ideas clearly for mutual understanding.

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- Exchange accurate information effectively in various situations.
- Observe details at close range (within a few feet of the observer).
- **Frequently** remain in a stationary position.
- **Occasionally** move around the workspace.
- **Constantly** operate a computer and other office productivity machinery.
- **Rarely** ascend/descend a ladder.
- **Occasionally** position oneself to maintain files or other items.
- **Rarely** move items weighing up to 60 pounds across the office for various needs.
- **Never** work in outdoor weather conditions.
- **Never** operate a vehicle.
- **Rarely** travel between worksites.