POSITION DESCRIPTION

TITLE: Financial Customer Service Instructional Assistant
LOCATION: High School
REPORTS TO: College, Career, and Technical Education Program Instructor
DEPARTMENT: College, Career, and Technical Education

SUMMARY STATEMENT:
Under the supervision of the Director of College, Career, and Technical Education (CCTE) and the program instructor, this position is responsible for assisting in the supervision of students on an individual and small group basis. The instructional assistant will assist in the daily operation of the school’s credit union, help students with technical teller training, organize and assemble instructional materials, assist in the instructor in the evaluation of teller work, and student performance, and support leadership activities.

ESSENTIAL FUNCTIONS:
1. Assist the program instructor by supervising and working with students as follows:
   • Communicate effectively with students, staff, parents, and the general public
   • Oversee operation of the Credit Union and students performing as bank tellers
   • Assist with the daily operation of the school credit union
   • Assist in providing one-on-one and group instruction to students
   • Assist in organizing and preparing a variety of instructional materials
   • Assist in evaluating and specifying direction of instruction so as to maximize each student’s potential
   • Assist in administering and scoring formal and informal tests
   • Maintain accurate data on student progress
   • Implement behavioral management strategies using the emphasis and techniques that have been outlined by the instructor
   • Perform inventory process and other year-end activities
   • Attend various training sessions as required
   • Assist in establishing and maintaining a positive learning environment
   • Assist in organizing and preparing a variety of instructional materials
   • Maintain relationship with iQ Credit Union administration, and transport paperwork as needed
   • Perform First Aid/CPR when necessary

OTHER RESPONSIBILITIES:
1. Perform other related duties as assigned.

PHYSICAL DEMANDS REQUIRED:

<table>
<thead>
<tr>
<th>Vision (66-100%)</th>
<th>Speaking (66-100%)</th>
<th>Hearing (66-100%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standing (66-100%)</td>
<td>Sitting (33-66%)</td>
<td>Walking (33-66%)</td>
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<tr>
<td>Writing (33-66%)</td>
<td>Bending (33-66%)</td>
<td>Stooping (33-66%)</td>
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<tr>
<td>Acceptable Attendance</td>
<td>Reaching (33-66%)</td>
<td>Squatting (33-66%)</td>
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<tr>
<td>Lifting (33-66%) Up to 50 lbs. individually</td>
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<td>More than 50 lbs. with assistance</td>
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MENTAL DEMANDS REQUIRED:
Percentages of requirements of physical and mental tasks are only an estimate. Reasonable accommodations for persons with a disability will be considered in order for them to perform the essential functions of the job.

(66-100%) = Continuously  
(33-66%) = Frequently  
(Up to 33%) = Occasionally

TOOLS AND EQUIPMENT NECESSARY:
Desktop computer, copy machines, telephone, related computer software and other all other equipment and program knowledge necessary to perform the essential functions.

MINIMUM QUALIFICATIONS:
1. Minimum of two years experience as a bank teller supervisor required, with operational background preferred.
2. Experience operating an on-line or off-line banking system, including teller error location and correction.
3. Demonstrated knowledge of and ability to adhere to banking laws.
4. Teller training experience.
5. Demonstrated ability to communicate effectively with students, staff, parents, and the general public.
6. Demonstrated ability to work effectively with diverse groups, to include high school students, customers, bank employees, staff, and vendors.
7. Must possess personal characteristics of flexibility, initiative, cooperation, and confidentiality.
8. Demonstrated ability to perform under conditions of constant interruption.
9. Must possess organizational skills and the ability to follow through.
10. Demonstrated ability to coordinate lab activities for students with limited supervision.
11. Must possess current First Aid/CPR certification, or be able to acquire within 30 days.
12. Demonstrated ability to establish and maintain positive relationships with others as part of a team.

Variable Days Per Year (Includes Holidays)
Variable Hrs. Per Day
Position contingent upon enrollment

PSE: ____________________________ Date: ______________

District: ____________________________ Date: ______________

Revised Date: 08/06/2014
Classification: Professional Technicians (PSE)
Class: Class IV
Display on Web? Yes

Financial Customer Service Instructional Assistant