



## Job Description

**TITLE:** Operational Quality Improvement Specialist

**REPORTS TO:** Operational Quality Improvement Manager

### **PURPOSE:**

The Operations Quality Improvement Specialist is responsible for performing and completing operational quality improvement and back-office operational support tasks across the credit union. This role has direct accountability for executing operational duties, maintaining accurate documentation, supporting system and vendor-related tasks, and ensuring day-to-day operational processes are followed consistently. The position focuses on hands-on operational execution and task ownership while supporting the Operations Quality Improvement Manager by carrying out assigned initiatives, operational support activities, and quality improvement work across back-office and operational support functions.

### **RESPONSIBILITIES:**

- Perform assigned operational quality improvement and back-office operational support tasks with ownership for timely and accurate completion.
- Execute the development, updates, and maintenance of operations-related procedures, workflows, and job aids to ensure operational applicability.
- Maintain and manage operations documentation where needed on the credit union intranet, ensuring accuracy and accessibility.
- Complete routine operational reviews to ensure procedures, workflows, and practices align with approved operational policies.
- Carry out various operational support activities related to back-office functions, including but not limited to documentation, validation, reconciliation support, and process follow-up.
- Identify operational issues and inefficiencies and complete assigned corrective actions or improvement tasks.
- Track, update, and report on assigned operational performance metrics, quality indicators, and improvement actions.
- Support cross-departmental operational improvement efforts by completing assigned tasks, coordinating follow-ups, and documenting outcomes.
- Execute approved standardization and consistency initiatives across operational areas.
- Perform system-related operational tasks for core processing, digital, and other operational systems, including testing, configuration support, and issue tracking.
- Complete operational vendor-related tasks, including coordination, documentation, and support for enhancements or changes.
- Support operational compliance and quality improvement activities by completing documentation requests, control evidence, and support tasks.



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- Execute communication and change-management support tasks, including preparing operational guidance, reference materials, and updates.
- Provide operational support to internal teams by responding to process questions, fulfilling documentation requests, and clarifying procedures.
- Coordinate assigned tasks with various departments and operational teams to support operational tasks, system updates, upgrades, and process improvements.
- Support the Operations Quality Improvement Manager by completing any assigned initiatives, research, and operational execution activities.
- Perform other operational and back-office support duties as assigned.

### **BSA COMPLIANCE:**

Must uphold compliance with the Bank Secrecy Act (BSA), OFAC, USA PATRIOT Act, and related regulations. This includes member identification, monitoring high-risk accounts, reporting suspicious activity, and ensuring all compliance procedures are followed.

### **JOB COMPETENCIES:**

- Communication
- Collaboration
- Policy Compliance
- Attention to Detail
- Accountability
- Quality

### **REQUIREMENTS:**

- Associate’s or Bachelor’s degree in Business, Operations, Finance, or related field preferred, or equivalent operational experience.
- 2–5 years of experience in credit union or financial institution operations and back-office support, operations, or system support roles.
- Experience supporting operational processes, documentation, or quality initiatives preferred and operational workflows and documentation.
- Strong organizational and time-management skills.
- High attention to detail and accuracy.
- Ability to follow structured processes and standards
- Clear written and verbal communication skills
- Ability to work independently and as part of a cross-functional team
- Completion of all required compliance and information security training annually.

### **WORKING CONDITIONS:**

- Ability to lift 10-15 lbs.
- Ability to sit for long periods of time